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CITY AND COUNTY OF SAN FRANCISCO
and WILLIAM FRAZIER

IN THE UNITED STATES DISTRICT COURT
NORTHERN DISTRICT OF CALIFORNIA

SUSIE ABRAM,

Plaintiff,

vs.

CITY AND COUNTY OF SAN
FRANCISCO, DEPARTMENT OF
PUBLIC HEALTH; WILLIAM FRAZIER,
DIRECTOR OF THERAPEUTIC
ACTIVITIES, LAGUNA HONDA
HOSPITAL

Defendant.

Case No. C07-3006 PJH

E-filing case

**DECLARATION OF CHRISTINE
HANSON IN SUPPORT OF MOTION
FOR SUMMARY JUDGMENT**

Date: June 18, 2008
Time: 9:00 a.m.
Courtroom: 3, 17th Floor
Hon. Phyllis J. Hamilton

Action Filed: June 8, 2007

I, Christine Hanson, declare as follows:

1. I am an Activity Therapist Supervisor (Civil Service Class 2589 Health Worker IV) at Laguna Honda Hospital and Rehabilitation Center ("Laguna Honda" or the "Hospital"). I have held this position since May 2002. Before that I was an Activity Therapist (Civil Service Class 2587 Health Worker III) at the Hospital since July 1991. I have personal knowledge of the matters herein and, if called as a witness, could and would competently testify to the matters set forth below.

1 2. Laguna Honda is a licensed hospital operated by the City. Laguna Honda provides
2 a full range of skilled nursing services to adult residents of San Francisco, who are disabled or
3 chronically ill, including specialized care for those with wounds, head trauma, stroke, spinal cord
4 injuries, orthopedic injuries, AIDS and dementia. The hospital also has a hospice program.

5 3. As an Activity Therapist Supervisor, I supervise Activity Therapists in providing
6 social, cognitive, physical, and creative therapeutic activities to the residents of Laguna Honda. From
7 May 2002 to early November 2003, I supervised Plaintiff Susie Abram. I was the Activity Therapist
8 Supervisor in charge of the residents in the Hospital's D3 psychosocial cluster. This was the only
9 time I supervised Abram during her employment with the City.

10 4. From the start, I found Abram had job performance issues. First, she lacked
11 necessary skills in a variety of areas. It was clear to me that Abram's skill set did not meet the
12 increasing demands of her job. For example, she frequently failed to provide required documentation
13 on a timely basis for the residents under her care or prepared documentation that was incomplete or
14 inaccurate. The Hospital depends on Federal and state funding that is tied to timely and accurate
15 assessment and documentation of resident needs. Also documentation of the resident care, including
16 assessment, care plans, quarterly progress notes and participation records, are required to maintain the
17 Hospital's license during annual surveys by the California Department of Human Services.

18 5. In the area of program planning, I found her delivery of services to be repetitive,
19 and failed to provide the kind of well thought out skill development and therapeutic activities our
20 residents needed. Abram resisted my efforts to provide a variety of new or different programs for the
21 residents under her care. An example, was her resistance to eliminating bingo from her unit schedule.
22 I noted this issue as well as other performance issues in an October 27, 2002 memorandum to her. A
23 true and correct copy of that memorandum is attached as Exhibit A.

24 6. I also confronted repeated problems with the quality of the monthly program
25 calendars Abram was required to submit to me for approval. These calendars were used to plan
26 resident activities over the course of the month and were an important planning tool for the Activity
27 Therapy Department, not just the Abram and the residents under her care. Abram's calendars were
28

1 difficult to read and often lacked the necessary detail expected for Activity Therapists. I also raised
2 this performance issue with Abram in my October 27 memorandum (Exhibit A).

3 7. Another area in which I found Abram's skills to be lacking was her ability to plan
4 and carry-out off-site activities such as a trip to a restaurant, shopping mall, Movies, museums,
5 picnics, etc. She often failed to think through all aspects of the off-site trips she offered her residents
6 and made excessive demands for support. For example, in April 2003, Abram scheduled a trip to
7 Cache Creek Casino for a group of residents. This activity raised several issues including the
8 propriety of taking a group of elderly residents with psychosocial mental disorders on an all day trip
9 to a gambling establishment where alcohol would be served. It was unclear at the time that she
10 proposed this trip whether Abram had considered the physical and emotional challenges this trip
11 might present for her and the residents. After discussing these issues with the nurse manager of the
12 interdisciplinary team assigned to the care for these residents, I nonetheless allowed this trip to go
13 forward. Attached as Exhibit B are true and correct copies of memorandums dated April 7 and 22,
14 2003 I sent to Abram concerning this trip. As the April 7 memorandum reflects, I provide for four
15 staff members and two volunteers to accompany ten residents on this trip.

16 8. In addition to issues related to her job skills, a second concern about Abram's job
17 performance was her resistance, and at times hostility, to my efforts to monitor and improve her job
18 performance. She was unnecessarily confrontational about even minor issues or disagreements.

19 9. In September 2002, in order to provide services to the D3 residents we needed
20 access to materials Abram kept in the unit locker on the D3 ward. She was on month long vacation
21 and had not left a key to the locker. The purpose of the locker was to store activity related materials,
22 not personal items. Because not get into the locker I requested that Plant Services was made to cut
23 off the lock so we could use the activity supplies during her absence. It was my understanding that
24 all items were activity related and had been purchased with Hospital funds. On her return in October,
25 Abram's complained about having gone into locker and that certain personal items including music
26 CDs had gone missing. I met with Abram on October 16, 2002 to discuss this issue as well as others.
27 I apologized for any misunderstanding regarding the locker and the CDs. I indicated that if she put in
28 request, the Hospital would reimburse for any lost personal items. To my knowledge she never did

1 so. Attached as Exhibit C is a true and correct copy of an October 17, 2002 memorandum I prepared
2 commemorating the substance of my conversation with Abram on October 16.

3 10. I instituted formal disciplinary action against Abram on three occasions during the
4 time she worked under my supervision. The first instance occurred in December 2002. I prepared an
5 Employee Conference Form in early December regarding Abram's inattention to duty and
6 insubordination. Therein I noted Abram's failure to prepare certain required quarterly and annual
7 documentation regarding the care of several of her residents. Abram had scheduled a month long
8 vacation for September 2002. In anticipation of that vacation, I gave her a list in mid-August of
9 residents who were due for quarterly or annual documentation in September. I knew that Abram
10 often took a month long vacation at this time of year and that there was a history of her failing to
11 complete required documentation around that time. I asked that she prepare this documentation
12 before she left on her vacation. She failed to do so and, despite my efforts to get her to complete the
13 documentation on her return, she had failed to do so as of December. I noted in the Employee
14 Conference Form that failure to comply with state regulations regarding this documentation could
15 result in a citation against the Hospital. I recommended that Abram serve a three-day suspension.

16 11. I met with Abram and her union representative December 11, 2002 to provide a
17 copy of the Employee Conference Form and allow Abram an opportunity to respond. Abram
18 provided a variety of excuses for her failure to complete the required documentation. I considered
19 that information, but continued to believe a three-day suspension was appropriate. Abram requested
20 that Bill Frazier review my recommendation. He did so and in January 2003 decided to reduce the
21 recommended discipline to a written warning. Attached as Exhibit D are a true and correct copies of
22 the Employee Conference Form, two memorandum I prepared on or about December 11, 2002
23 documenting the substance of my conference with Abram and her union representative, and Bill
24 Frazier's written review of my recommendation. To my knowledge, Abram did not pursue any
25 further review of this disciplinary matter.

26 12. In April 2003, Goldie Davary, the nurse managers for the Interdisciplinary Team
27 ("IDT") providing care to Abram's residents alerted me to the fact that Abram had been making
28 accusations of "discrimination" against me during an IDT meeting. I had heard Abram make such

1 accusations in the past against others and me. It was clear from what the nurse manager told me, and
2 my previous experiences, that Abram was unhappy about my efforts to supervise and improve her
3 performance. But Abram never stated to me that she believed I was "discriminating" against her or
4 that my actions were in any way motivated by her race. Nonetheless, I alerted Martin Lum, an
5 analyst in the Hospital's EEO office regarding Abram's complaints. I also encouraged Abram to
6 contact Lum if she wished to pursue any claims of discrimination against others or me. I had
7 previously encouraged Abram during a meeting in December 2002 to contact Mr. Lum if she felt the
8 need to do so. I also called Mr. Lum myself in December 2002 to report Abram's claims. To my
9 knowledge Abram never contacted Mr. Lum. I commemorated these events in a memorandum to
10 Abram on April 14, 2003. Attached as Exhibit E is a true and correct copy of the memorandum.

11 13. As noted above, I began supervising Abram in May 2002. In May 2003, I prepared
12 a Performance Appraisal Report for Abram for the time period June 1, 2002 to March 15, 2003.
13 Therein, I noted Abram's strengths as well as her weaknesses. I rated her performance as "exceeds
14 expectations" or "competent and effective" in numerous areas. I also noted her need to improve in a
15 number of areas of the review including assessments, documentation, planning, implementation, and
16 communications. I set forth the reasons for my evaluation for each rating criteria. I gave Abram an
17 overall evaluation rating of "development needed." In light of that evaluation, I prepared
18 Development Plans for Abram in three areas of core competency: (a) improved implementation of
19 activities; (b) improved planning skills; and (c) timely and appropriate completion of required
20 documentation. I presented Abram with a copy of the Performance Appraisal Report and
21 Development Plans on or about May 13, 2003. Attached as Exhibit F are true and correct copies of
22 the Performance Appraisal Report and the Development Plans that I prepared.

23 14. Abram refused to sign the Performance Appraisal Report or the Development Plans.
24 Instead, she provided a written response to Report. A true and correct copy of her written response is
25 attached to Exhibit F.

26 15. Abram request that Bill Frazier, the Director of Activity Therapy, review the
27 Performance Appraisal Report. In July 2003, I spoke with Mr. Fraizer about the Report and reiterated
28 the reasons for my evaluation of Abram's job performance. Thereafter, he indicated that he agreed to

1 go forward with the Development Plans, but asked me to revise the dates for the Development Plans
2 to cover the period July 1 to September 1, 2003. The original Development Plans covered the period
3 May 13 to July 15. I did so and indicated as such at the bottom of a July 14, 2003 memorandum from
4 Frasier. Attached to Exhibit F is a true and correct copy of that memorandum with my handwritten
5 acknowledgment that "changes were made" and dated July 14, 2003.

6 16. On May 9, 2003, Abram took several residents in the D3 cluster for a restaurant
7 outing at Chevy's. On her return, Abram's reimbursement requests for staff lunches exceeded the
8 amount that was reimbursable by \$1.98. I asked that she cover that amount. More significantly,
9 however, was the fact that she did not provide appropriate invoices to cover the reimbursement of
10 resident lunches. Rather than submit a printed receipt from the restaurant for all of the charges, she
11 submitted a hand written receipt for certain charges. Typically all reimbursement requests are
12 required to be supported by itemized, printed, date specific receipts or invoices. I called the
13 restaurant to find out if they prepared hand written receipts and they told me that they did not. I
14 advise Abram that in the future, she needed to provide proper receipts and invoices for
15 reimbursement. I commemorated this instruction in a memorandum to Abram dated May 9, 2003. A
16 true and correct copy of that memorandum is attached as Exhibit G.

17 17. In light of Abram's difficulty in preparing a useful and legible activity calendars, I
18 encouraged her to use a computerized calendaring program. It required very little computer skills to
19 utilize this program and provided a uniform format for activity calendaring. Abram had great
20 difficulty performing even the most basic computer operations such as preparing the calendar, and
21 sending and receiving email. I worked with her on numerous occasions to improve her computer
22 skills to perform these basic tasks. I also advised her of computer skills training programs made
23 available by the City and indicated that I would excuse her from job duties to attend such training
24 programs. I also encouraged all the other Activity Therapist I supervised to use this computerized
25 calendar. Like Abram, one of those Activity Therapists, Lynn Lustgarten, had only rudimentary
26 computer skills. Knowing that I had limited time to train the two of them, I focused on training
27 Abram first and then began to train Lustgarten on the computer calendar system shortly thereafter.
28

1 18. On numerous occasions, I mentioned to Abram as well as other Activity Therapist
2 the need to maintain the appearance of their cubicles and work area. In general, I often found the
3 cubicles to be overrun with boxes, paper work, and activities materials. In my view, this has been a
4 chronic problem in the Department and created workplace safety issues. Abram was not the only
5 offender. I never disciplined Abram or any other Activity Therapist because of the appearance of
6 their cubicle.

7 19. Since becoming an Activity Therapist Supervisor, I have a private office and a
8 computer in my office. I use this computer for a variety of work-related activities including preparing
9 letters, memorandums, performance evaluations, and disciplinary notices. I do not share this
10 computer with anyone. Given the sensitive nature of performance evaluations and disciplinary
11 notices I do not share these kinds of documents, whether on my computer screen or in hardcopy, with
12 anyone other than the particular employee who is the subject of such a document and my supervisor,
13 Bill Frazier.

14 20. I instituted formal disciplinary action against Abram a second time in August 2003.
15 I prepared an Employee Conference Form on or about August 21, 2003 regarding Abram's inattention
16 to duty, failure to properly manage a cluster wide activity, and dishonesty. This disciplinary issue
17 arose as a result of a "summer/garage sale" Abram organized for the psychosocial cluster. As
18 detailed in the Employee Conference Form the activity was disorganized, Abram failed to ensure
19 clean up after the activity, and there were significant questions regarding the funds raised during this
20 activity. I recommended a two-day suspension. Abram again took a month long vacation in
21 September, so I did not present this Employee Conference Form to Abram and her union
22 representative until October 2003.

23 21. I met with Abram and her union representative on October 16. At that time, she
24 provided an explanation for what had transpired during the "summer/garage sale" and sought
25 dismissal of the charges against her. Abram also provide a brief written rebuttal. Attached as Exhibit
26 H are true and correct copies of the Employee Conference Form I prepared, a memorandum I
27 prepared on or about October 16, 2003 commemorating the substance of my conference with Abram
28 and her union representative, and Abram's written rebuttal.

1 22. Abram again requested that Bill Frazier review this disciplinary matter. He did so
2 and reduced the recommended discipline to a one-day suspension. A true and correct copy of
3 Frazier's written review and recommendation is also attached to Exhibit H. I do not know whether
4 Abram served this suspension or pursued a grievance under her union MOU.

5 23. Abram took an extended leave of absence beginning on or about November 3, 2003.
6 She did not return to work until ten months later on or about September 17, 2004. During her leave I
7 did not have any contact with her.

8 24. When she returned to work in September 2004, she was assigned to a different
9 supervisor, Barbara Taoramina, and a different cluster. I had little contact with Abram from that
10 point forward to her resignation in June 2005.

11 25. I implement formal discipline against Abram in October 2003. I began preparing an
12 Employee Conference Form in August 2003 regarding Abram's failure to meet the goals of the
13 Development Plans instituted following her performance evaluation. I alerted her union
14 representative in August about this disciplinary matter. He requested that the conference be
15 postponed until October after Abram returned from her September vacation. As detailed in the
16 Employee Conference Form, Abram failed to show satisfactory performance improvement in several
17 of the core competency areas identified in the Development Plans. I recommended a four-day
18 suspension.

19 26. I presented this Employee Conference Form to Abram and her union representative
20 on October 23, 2003. Abram appealed my recommendation to Bill Frazier and later filed a grievance.
21 To my knowledge, the grievance was never heard and no disciplinary action was ever implemented
22 against Abram as a result of this notice. Attached as Exhibit I are true and correct copies of the
23 Employee Conference Form and supporting documents, a memorandum I prepared reflecting the
24 substance of my October 23 conference with Abram and her union representative, and Bill Frazier's
25 written review and recommendation regarding this disciplinary action.

26 27. I was advised by Bill Frazier sometime after Abram's return from leave that she had
27 complained about the behavior of my dog Teemu, a 40-pound Boxer mix, Teemu has been cleared
28 by Hospital staff to work with Activity Therapist to provide animal assisted therapy to Laguna Honda

1 Residents. I bring him to work approximately 1-2 times a week to work with Activity Therapist
2 providing animal assisted therapy programs for their residents. While under my supervision, Abram
3 had taken Teemu to her unit for visits. Bill indicated that he was looking into Abram's complaints
4 and, in the interim, requested that I not bring Teemu to work. I complied with those instructions.
5 Sometime thereafter, Bill advised me that he would allow Teemu to resume her visits to the Hospital.
6 but instructed me that except when she was working with residents, she should be in my office and/or
7 on a lease. I told him that I would make every effort to comply with those rules and did so. I do not
8 recall Abram or anyone else ever directly complaining to me regarding Teemu.

9 I declare under penalty of perjury under the law of the State of California that the foregoing is
10 true and correct, and that this declaration was executed on May 14, 2008, in San Francisco,
11 California.

12
13
14 
CHRISTINE HANSON

EXHIBIT A

To: Susie Abrams
 From: Christine Hanson
 Date: 10/27/02
 RE: November Calendar

I would like to go over this together, but I think time is an issue. This is about the calendar you turned in for approval. It is not acceptable. Lucy came to me with your calendar last week with many concerns. The first is it is not legible. I am having difficulty reading it myself. Do you have any ideas on how to fix this problem? I am playing with a program that you may use to type in the information. It is not ready yet. I have given you a fresh copy of November 2002 calendar. Please, try to clean it up. Print if necessary.

I have other concerns. I have given you an opportunity to explain to residents the need for activity changes. I will not accept that you are unable to eliminate bingo from your ward schedule. I feel you have not been effective in explaining the need for changes to your residents. I know you wanted me to come and discuss this at your community meeting on Friday. I am off on Fridays. If you need assistance, I am sure Lucy and Bill would be willing to attend the meeting with an invitation. The bottom line is you must eliminate bingo from ward activities, except for special situations.

- 1) On Sundays add the 7th floor bingo at 3:30
- 2) On Mondays Add Spanish Club in Volunteer lounge at 10:30
- 3) Tuesdays the bible study location has changed to E3
 - A) The 19th I can't read the activity at 2pm
 - B) The 26th you need to add a second ward activity in the afternoon (late night=2 ward activities and hospital program)
- 4) On Wednesdays the crafts program is scheduled for 2pm on 11/13, 11/20 and 11/27
 - A) I can't read the activity on 11/6 at 11:30
 - B) I can't figure out the activities on the 13th at all
 - C) The 20th the gift shop is closed at 3:00pm
 - D) The 27th you need to add an activity before or after the bustrip
- 5) After much discussion Pat and I decided that Blackjack would work best on Friday afternoons in Moran Hall. That was a recent change.
- 6) Saturdays please plan your time on your unit in the afternoon.
 - A) 2nd please change the movie to an on ward activity
 - B) 9th change one of the 1:1 activities to a group on ward activity.
 - C) 23rd 3pm in Move on the ward. Is that exercise? Change the music activity to something on the unit.
 - D) 30th Pottery Barn is Another persons responsibility (transport is OK), add something in it's place and change music activity to something on the unit as well.

This week will be very hard to meet. We usually meet on Wednesdays at 8:45, but as we discussed last week we would not have time with Halloween activities. If you need to discuss these issues with me the only time will be at 5pm Tuesday evening. Leave me a note if that is what you want to do. Otherwise, I will expect the corrected calendar.

Lastly, the bustrip forms you turned in were incomplete. The backside is missing. You have not designated a restaurant nor requested monies for the 11/27 trip. The trip to the shopping mall you don't have a food order. Is there another plan?

EXHIBIT B

To: Susie Abram
From: Christine Hanson CP
Date: 4/7/03
RE: Cashe Creek Bustrip

Per our discussion last week, I am approving the request for the trip with the following conditions;

- 1) 10 residents are attending. You should have backup people in case of a problem.
- 2) Staff in attendance are driver, you, (C3/E3) CNA, Jean
- 3) Jean will need to pay for her own lunch.
- 4) Art the volunteer can attend and will need to pay for his own lunch
- 5) Mr. Glenn will have his cousin attend, and he will need to pay for his own lunch as well.

The department will pay for 3 staff to have lunch, the driver, you and the CNA, just like a restaurant trip. The total number of help is 4 staff and 2 volunteers (including the family member). You must take 10 residents in order for the bus to go out. The amount of money authorized is $\$8.01 \times 13 = \104.13 .

Please complete a new bustrip form with the changes.

To: Susie Abram
From: Christine Hanson
Date: 4/22/03
RE: Cashe Creek Outing

Points to remember from our discussion with Goldie on D3.

1. Call family members to confirm their attendance, Mrs. Hayes and Mr. Glenns' cousin.
2. Contact Tess, confirm the CNA from the E/C team, confirm that residents have their spending money, confirm the attendance of Harry Steward from E3. Remember that you need 8 residents to go on the trip.
3. You are working flextime 7:30-5:00pm. You can take an hour morning or afternoon, on Thursday or Friday, April 24th or 25th. You need to take the time then because the pay period ends on Friday the 25th. Please give me your decision in writing on Wednesday the 23rd.
4. Check with the kitchen on the bag breakfasts.
5. Please refer to the memo dated 4/7/03 for other references.
6. The request was made for 8 residents, 4 assistants and 2 bridge tolls. The total was \$100.00.

My pager is 415-376-2263; Barbara's pager is 415-376-2266. I hope you and the residents have a wonderful time.

EXHIBIT C

To: Susie Abrams

From: Christine Hanson

Date: 10/17/02

RE: Notes for meeting on 10/16/02

This memo is a summary of our meeting yesterday. There were a number of issues we discussed. They were 1) the theft of The CD's on your unit, 2) missing decorations, 3) large calendar expectations, 4) IDT assistance, 5) intergenerational programs, 6) the need for prosocial exchange and activity evaluation and 7) conflict resolution.

We discussed the theft of the CD's on your unit. I recommended you file a police report with IP. You had informed me a number of the CD's did not belong to you or the unit. When I put them out for the residents to use, I assumed they belonged to the hospital. That was my mistake. The department will pay you for the loss. However, it should be noted, things left in the closets on the units are for items belonging to the hospital or unit. After discussing this with the IP I was informed there is a vague policy regarding bring personal items to work. When you follow up with IP ask them about the policy. Be sure to get a copy of the report and turn a copy in to me, to Bill and keep one for yourself.

Second, we discussed the fact decorations were missing. We agreed to keep an eye out for decorations with your initials.

Third, the large calendar had many entries this month and you would like to return to listing 3 activities. That is acceptable as long as the Moran Hall activity calendar is also made available.

Next, you expressed concern about the support you are, or are not receiving from your IDT. I informed you I had planned to have a brainstorming session on this issue with the team. We ran out of time. Until I get the chance to get that together, I will send an email to Lucy.

Also, you informed me of the intergenerational program you are heading starting the end of this month. I wish to support you in this assignment and offered a copy of the yearly calendars to use for planning. The rest of the issues will need to be discussed.

We agreed that a prosocial information exchange and activity evaluation meeting should be planned. I will follow up.

Lastly, we discussed the issue that remains unresolved between you and Pat. I offered to contact EAP for mediation between the two of you. You stated you would think about it and get back to me.

EXHIBIT D

Case 3:07-cv-03006-PJH Doc
EMPLOYEE CONFERENCE FORM

RECEIVED
DATE 03 MAR 25 PM 3:50
HUMAN RESOURCES
DEPT. OF HEALTH SERVICES
LAGUNA HONDA HOSPITAL

YOU HAVE THE RIGHT TO REPRESENTATION AT THIS CONFERENCE

HAS CONFERENCE BEEN HELD WITH EMPLOYEE PREVIOUSLY REGARDING DISCIPLINARY PROBLEMS? YES NO ☒ X

CCSF 00289

LIST CHARGE(S); Inattention to Duty: Insubordinate Behavior—Refusal of assignment
THIS CONFERENCE:

SUBJECT (S) OF THIS CONFERENCE:

1. Inattention to Duty:

On Saturday August 31, 2002 you began a month long vacation. Prior to your vacation, the second week of August, I gave you the list of residents, which may be due for quarterly or annual documentation. Then, during the last week of August the MIS sheet was given to you, the formal list of documentation due for the month of September. These forms and information were to assist you in completing the September documentation before you went on vacation. I made the expectation clear that you must complete the documentation. You returned from your vacation on October 4, 2002. I asked for your September MIS sheet a month after that, November 5, 2002. That gave you a month to finish the documentation. You did not have it. You made it clear that you were not planning to complete the assignment by stating you were not here and you didn't have time. There were 15 documents due during September. It has always been the departmental policy to complete documentation regardless of days off or vacation. To date I do not have the completed MIS sheet (copy attached). The tardiness of documentation due during your vacations is clearly documented in your performance appraisal (see attached).

2. Insubordination—Refusal of assignment:

The evening of November 5, 2002, I reviewed the D3 charts for September documentation. Of the 15 documents that were due, 2 were completed on August 28 2002, before your vacation. The rest were not completed. As a matter of fact, the previous years documentation for September is also missing from the charts. You took vacation then as well. Lisa Randon, your previous supervisor, directed you to complete the 2001 MIS documentation for September and they were not completed (see attached). Nevertheless, I wrote you a memo dated November 12, 2002 directing you to complete the remaining September 2002 documentation by 11/27/02 (copy attached). I asked you about your questions or concerns regarding the assignment during our meeting the next day. You stated, "I will do the best I can". On 11/27/02, I reviewed the charts again. None of the 13 missing documents had been completed. In the 2 weeks you had to complete documentation, you have completed none. Since you did not come to me to request an extension, it appears you never intended on completing this assignment.

Failure to comply with the state regulations involving documentation could result in the hospital being cited. I will be recommending a 3 days suspension for disciplinary action.

Attachments: 2 memos by Lisa Randon (10/15/01)(10/18/01), Copies of 2001 & 2002 MIS sheets,
Memo from Christine Hanson (11/12/02), Performance Appraisal

☐ Employee Copy

☐ Department Copy

☐ File Copy

310 3/21/03

NAME: CHARGE(S) NOTIFICATION DATE:

EMPLOYEE'S STATEMENT (OPTIONAL):

ACTION BY IMMEDIATE SUPERVISOR

see attached

ACTION RECOMMENDED:

☐ DISCIPLINARY
WARNING☒ DISCIPLINARY
SUSPENSION 3
DAYS☐ TERMINATION/
DISMISSAL☐ OTHER, SPECIFY:

I ACKNOWLEDGE THIS CONFERENCE, WHILE NOT NECESSARILY AGREEING TO THE ABOVE ALLEGATIONS;

12/11/02
DATE OF CONFERENCE


EMPLOYEE SIGNATURE

ANSON, CTRS
SUPERVISOR SIGNATURE

COPY OF CONFERENCE FORM:

☒ GIVEN TO EMPLOYEE _____ OR ☐ SENT CERTIFIED _____
DATE MAIL DATEYOU MAY REQUEST A REVIEW OF THIS RECOMMENDATION TO THE REVIEWER BY 12/18/02
(Date)William Frazier, Director of Therapeutic Activities
NAME AND TITLE OF REVIEWER
(Division Head or Designee)☐ Employee Copy ☐ Department Copy ☐ File Copy

CCSF 00290

From: Christine Hanson 

The employee conference occurred on 12/11/02 at 4pm in B104. The parties in attendance were Susie Abram, Ruben Gracia (union rep) and myself, Christine Hanson.

Ruben Gracia did not have the entire set of documents prior to the meeting. Susie failed to give him a copy of the memo, which directed her to complete the documentation with a deadline. He was given a copy of the memo.

The employee brought many issues up which impacted her ability to complete the documentation.

- 1) Susie stated that she was working on other units in November. She was implying she did not have time to complete the documents. She was scheduled on other units on 3 days during that month. Which totaled 3 hours off her unit. If she had not been assigned to those units, she would have been expected to plan another activity on her own unit.
- 2) Susie brought a few documents with her to the meeting. They were apparently annual assessments that were due. The documents were not in the charts on 11/27/02.
- 3) She also stated she was holding onto the assessments to get them approved by me. She has not shown me any of the documents she was directed to do prior to this meeting, nor has she asked for my assistance on any other required documents.

The information has been considered. Susie Abram was given more than 3 months to complete the documents for which she is responsible. August she was given a list of residents who may be due while she would be gone and later in the month given the MIS sheet (formal list of required documents). She completed 2 of the quarterly reviews required. September she was on vacation. October, she was given the opportunity to complete the documents independently. Then in November, she was given written direction to complete the remainder of the documentation. She did not complete any of the required documents that remained (13). I continue to recommend a 3-day suspension for insubordination and inattention to duty.

CCSF 00291

DEPARTMENT OF PUBLIC HEALTH

REVIEWER

PAGE 3

Susie Abram

Inattention to Duty, Insubordination

December 3, 2002

NAME CHARGE(S): NOTIFICATION DATE:

REVIEW AND RECOMMENDATION BY REVIEWER

See Attached

ACTION RECOMMENDED:

☒ DISCIPLINARY
WARNING

☐ DISCIPLINARY
SUSPENSION. _____
DAYS

☐ TERMINATION/
DISMISSAL

☐ OTHER, SPECIFY: _____

☐

William D. Fagin
Director of Therapeutic Activities

SIGNED: _____

REVIEWER (NAME AND TITLE)

January 3rd, 2003

DATE OF REVIEW

COPY OF CONFERENCE FORM:

☒ GIVEN TO EMPLOYEE 2/24/03
DATE

OR

☐ SENT CERTIFIED
MAIL

DATE

☐ Employee Copy

☐ Department Copy

☒ File Copy

CCSF 00292

On January 3, 2003, a review meeting was held on the recommended disciplinary action (3 day suspension) against Susie Abram, Health Worker IV. Present at the meeting were Susie Abram, Health Worker IV; Ruben Garcia, SEIU Representative; and myself, William Frazier, Director of Therapeutic Activities.

I opened the meeting summarizing the purpose of the meeting. Ruben asserted that it was his opinion that the disciplinary action should be a verbal warning and that the recommendation of a three-day suspension did not represent progressive disciplinary action. I pointed out that one of the charges was insubordination and that guidelines for progressive disciplinary action developed by the City and County suggest a 5-day suspension for the first offense. Ruben expressed his opinion that the charge of insubordination was inappropriate in this case. Ruben indicated that Susie had not been subjected to disciplinary action within the past three years.

Susie presented information related to her heavy workload during the month of August including covering units other than her primary unit and doing preparatory work for her upcoming vacation. I pointed out that the issue was her not completing an assignment after she returned from vacation in early October. Susie indicated that she had to cover another unit in October as well. Susie began to discuss an issue concerning her supervisor access a storage cabinet on her assigned unit and audio compact discs being lost. I asked her if that issue was pertinent to this conversation. Susie indicated that this and many of the changes that were taking place on her unit caused her stress which affected her ability to complete the work as assigned. Susie said that she had been working hard to complete all of the work that had been assigned to her. She indicated that the documentation due in September had been completed. She indicated that she dated the assessments or progress notes on the date completed and noted that the documentation was "for September." I asked her to clarify that the progress notes and assessments that were due in September were complete. I pointed out that three months had passed and the residents who were due for documentation in September were due again in December. Susie stated that she had completed both sets of documentation. Susie stated that she tried on several occasions to discuss her progress with her supervisor and that she was not accommodated.

Susie then indicated that it was her belief that disciplinary action related to documentation was not applied consistently within the department. I expressed my disagreement and concern with her statement.

I told Susie and Ruben that I would investigate the issue to determine if a good faith effort had been made to complete the assignments as well as efforts to communicate her progress with her supervisor. I told Susie and Ruben that my determination in regards to the appeal would be included in a written report and sent to them.

Susie then expressed her concern for two interactions between her and myself, unrelated to this issue. I responded to her concerns.

I questioned Christine Hanson about Susie's claim that she was not accommodated when requesting meetings with Christine to discuss her documentation. Christine indicated that a weekly meeting had been established between the two on Wednesday afternoons. Three meetings were scheduled spanning from the time Susie received the memorandum and the deadline it gave for completion of the delinquent documentation. Christine reports that Susie failed to attend two of those meetings without notice. Christine reports that during this time, Susie did request an additional meeting of which Christine could not accommodate as her schedule would not allow. However, Christine indicated that the topic of the discussion was to be related to scheduling of Community Meetings on unit D3.

I reviewed 14 medical records for which Susie Abram was responsible on Wednesday, January 8th. I found the documentation for September, as well as the documentation for December to be significantly incomplete. I was able to determine that Susie's claim the documentation was complete to be untrue. Additionally, I further found the quality of the documentation to be lacking with many irregularities and non-compliance with established practice within the Activity Therapy Department including the use of out-dated assessment forms, improperly dated documents and sections of the assessment forms left blank. I will forward a copy of my findings to Susie and her supervisor to ensure that these files are reassessed and documented properly. I will also request that Susie and her supervisor work together to improve the case documentation via a developmental plan and I hope to see marked improvements in Susie's ability to document her assigned cases.

It is also noted that Susie failed to acknowledge any responsibility in addressing the lack of performance and her failure to comply with multiple requests made by her supervisor to complete the required documentation, which is required of all employees in her position within this department.

These are very serious charges that place the hospital in non-compliance with licensing and certification bodies. There have been a number of performance and professionalism issues involving Susie Abram over the past several years. This is the first time that an issue has been confronted in a formal disciplinary action. I am reducing the recommended disciplinary from a three day suspension to a written warning. This reduction is being made as a demonstration of good faith on the part of the leadership of the Activity Therapy Department. Susie will be expected to make a good faith effort to comply with departmental standards and put forth effort in improving her skills and attitude toward supervision.

From: Christine Hanson

The employee conference occurred on 12/11/02 at 4pm in B104. The parties in attendance were Susie Abrams, Ruben Gracia (union rep) and myself, Christine Hanson.

The employee brought many issues up.

- 1) Susie stated that she was working on other units in November. She was implying she did not have time to complete the documents. I do not feel that is true. She was scheduled on other units on 3 days during that month. Which totaled 3 hours off her unit. If she had not been assigned to those units, she would have been expected to plan another activity on her own unit.
- 2) Susie brought a few documents with her to the meeting. They were apparently annual assessments that were due. The documents were not on the proper form; they had many dates on them and were not in the charts on 11/27/02. She also stated she was holding onto them to get them approved by me. That has never happened in the past. Also, she has not shown me any of the documents she was directed to do prior to this meeting.
- 3) Susie asked a few questions. First, she asked if other supervisors were writing up staff for these offenses. She also asked why her previous supervisors didn't write her up in the past. I stated, "I can't answer those questions. She would have to ask those people herself." She then asked if other people were being written up for their offences. I stated that if other staff did what she did, they too would receive a recommendation for disciplinary action. She asked why I was "picking" on her. I explained this was not personal. I was setting performance standards, as my job requires.

Ruben Gracia did not have the entire set of documents prior to the meeting. Susie failed to give him a copy of the memo, which directed her to complete the documentation with a deadline. He was given a copy of the memo, but then proceeded to attempt to get the charge of insubordination eliminated. I directed his attention back to the documents included with the conference form.

Lastly, the documents were signed and Susie wanted to discuss one more issue. I agreed. It was in regards to some CD's being left out on her unit. I explained to them both: while Susie was on vacation, Lucy, the nurse manager, called needing to get into the activity closet to restore items that Susie had left out in the nurses station. The DOJ was scheduled to visit the following week (Susie would still be gone). Therefore, I took down the key from our office labeled D3. It did not open the cabinet.

I had the lock cut off the following day and had a new one to replace it with keys for AT department, Susie, myself and the nurses on D3. However, when I opened the cabinet, it was "stuffed". I could not get everything back into the cabinet. There were some CD's (about 10) which I left out under the CD player. That way the residents could enjoy them at their leisure. I was under the impression they belonged to the department or the unit. That was not the case. They may have belonged to Susie, the hospital or another therapist. That was never clarified.

Susie brought it to my attention when she returned that the CD's were not in the same condition as when she left and some were missing. I never saw what remained of the CD's. However, we followed up with a police report (see IP for information). Bill Frazier or I were waiting for information about the CD's, number, titles, etc. to replace them. Susie never followed up. As a matter of fact, she shrugged it off in one of our weekly meetings when I attempted follow up. I had also made it clear that personal items, as a rule, should not be in the unit cabinets. They really should not be allowed at all in the hospital. I spoke with IP and they can not protect personal items on hospital grounds. One of the officers had mentioned that he had had a conversation with Susie in the past about this issue.

At the end of the meeting, Susie stated, "You should get a 3 day suspension for losing my CD's!". I directed her to speak with the director, Bill Frazier, about that. She stated the suspension issue and the CD's again. I told her it was a good thing for me she was not my boss.

Susie stated when signing the conference form she intended on appealing the recommendation.

This evening, 12/11/02 I went to D3 again to check the documentation. I think it should be mentioned that MIS sheet for this month is the same people as last September. The difference is the types of documents due are different for 10 of the 15 residents. I have included a copy of December 2002 MIS.

I looked for the initial assessment and the 3 annual assessments due in September.

The initial was completed today. Three and a half months after the readmission.

One of the annual assessments due, the chart was gone because the resident had been discharged on 11/7, readmitted 11/13. A new initial assessment was due 11/19. There was no assessment in the chart on 11/27. However, there is one tonight, dated 11/17. I believe a forged date.

The other two annual assessments are not in the charts.

I did not check the quarterly reviews since each resident is due for another review this month.

EXHIBIT E

To: Susie Abram
From: Christine Hanson
Date: 4/14/03
RE: Continuing accusations

It has come to my attention that you were discussing accusations of discrimination in the IDT meeting last Wednesday. The nurse manager reported she was very uncomfortable and didn't feel this topic was appropriate during the IDT meeting. I have personally overheard you make many accusations regarding discrimination, including my discriminating against you.

I addressed this issue with you in a meeting in early December 2002. I gave you the name and number of the person in the city that investigates claims of discrimination, Martin Lum (415) 554-2599. You stated that you had someone you could contact, a lawyer, and you declined to take the information. I was very concerned that your making uninvestigated accusations are creating a negative, hostile environment. I also feel I need to be on record stating I am attempting to manage your performance, and you are interpreting that management as discrimination. Therefore, I called Martin Lum myself and gave him information about your claims on 12/19/02. He was informed of your verbal claims and your declining the information to make a complaint.

The leadership of the department feels your claims are contributing to poor moral, constitutes intimidation and can not be tolerated. If you are feeling discriminated against, you need to use appropriate channels to resolve the problem. I am expecting that you will not discuss these issues in professional settings including, but are not limited to, in the department, in IDT meetings, with residents, on the units and in the hallways where others may overhear your conversation.

Lastly, the accusations are not isolated to discrimination claims. You have called staff "liars" for reporting your inappropriate behavior. It appears you are attempting to intimidate people who try to hold you accountable for your actions. For example, you called supervisors' names when talking with other AT staff, while in the hallway of the department, and sitting at the table outside your cubicle, because you are being held accountable for signing out early. You defamed Pat Wagner because she reported your inappropriate interactions with residents involving her. Name-calling is unacceptable. You need to refrain from making these types of comments while here at the hospital.

This problem has become increasingly serious. I've offered you information to constructively manage your concerns. Disciplinary action may result if the inappropriate behavior continues. I recommend you follow through with a complaint with EEO department and Martin Lum. I also encourage you to speak with HR and/or union representative about your concerns. Another option for you is to contact EAP for support. Again, this is a serious problem for the department and the unconstructive accusations must not continue.

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EXHIBIT F

City
and
County
of
San Francisco

RECEIVED
03 JUL 21 11:39
LABORERS HOSPITAL

Performance Appraisal Report

Identification

1. LAST NAME, FIRST NAME, MIDDLE INITIAL Susie Abram	2. CLASS No. AND TITLE Health Worker III, 2587		3. STATUS Perm
4. WORK LOCATION & DIVISION Activity Therapy, LHH	5. DEPARTMENT	6. REASON FOR REPORT Annual	7. 1ST DATE IN CLASS 4/5/1982
	8. PERIOD OF REPORT 6/1/02 – 3/15/03		9. PROBATION ENDS

IO COUNTY OF SAN FRANCISCO/PERFORMANCE APPRAISAL REPORT/CSC 8-05, (REV January 1996)

CCSF 00006

Working Title:

2587 Health Worker III, Activity Therapist

Position Summary:

The Health Worker III – Activity Therapist works to enhance the quality of life and functional abilities for the residents of Laguna Honda Hospital. Each Activity Therapist participates on interdisciplinary team who collaboratively design a plan of care to meet the physical, intellectual, psychosocial, and spiritual needs of each resident. The Activity Therapist provides interventions and facilitates positive leisure opportunities to individual residents, small groups, and the entire hospital population.

Reporting Relationships:

- Reports directly to the Activity Therapy Supervisor and the Director of Therapeutic Activities
- Evaluated by the Activity Therapy Supervisor
- Collaborates with physicians, nurses, and other healthcare providers.

Major Responsibilities:

- Performs comprehensive assessments to determine the individual needs of assigned residents.
- Participates in the interdisciplinary approach to resident care planning.
- Performs appropriate documentation related to the care of assigned residents.
- Plans, implements, and evaluates individual and groups activities for residents in accordance with Title 22 and OBRA guidelines.
- Provides on average, 5 hours of direct service and/or intervention per day.
- Collaborates with other disciplines and hospital departments to provide assigned residents with the necessary opportunities and resources to achieve leisure related goals with the highest degree of independence possible.
- Plans and implements resident bus trips and outings into the community.
- Collaborates with fellow Activity Therapy staff members in the implementation of floor-based activities
- Prepares and maintains activities calendar on assigned unit(s).
- Contributes to the social dining experience on assigned unit(s).
- Plans and implements hospital-wide programs and special events.
- Supervises and directs volunteers and student interns as assigned.
- Effectively manages equipment, supplies, and other program resources
- Participates in department based and hospital-wide training programs.
- Attends and participates in department staff meetings.
- Contributes to the enhancement of department operations
- Communicates effectively with residents, family members, visitors, and staff
- Adheres to all department and hospital policies and procedures.
- Completes tasks as assigned by the Activity Therapy Supervisor and the Director of Therapeutic Activities
- Performs all tasks and responsibilities with a high level of productivity.

JOB TITLE: HWIII

Employee Name: Susie Abram

Rating Period: From 6/02 To 3/03

I Performance Criteria	II Rating and Comments
<p>Performance Elements and Standards (Relate to Major Responsibilities outlined in the Job Description.)</p>	<p>Rating/Comments on Actual Performance Select a rating number and comment on all sections.</p> <p>1-Unacceptable 3-Competent and Effective 5-Outstanding 2-Development Needed 4-Exceeds Standards</p>
<p>1. ASSESSMENT</p> <p>a. Utilizes appropriate assessment technique</p> <ul style="list-style-type: none">• Interview of resident.• Observation.• Review of the medical record• Collaboration with family, friends, and interdisciplinary team members. <p>b. Appropriately utilizes RAI to identify resident needs. Demonstrates awareness of resident status and ability to modify care plan</p>	<p>2 Rating/Comments</p> <p>Concerns have been raised over the accuracy of the MDS coding. D3 nursing staff have communicated that Susie overestimates the time residents are involved in activity. In a few cases, residents who have transferred from M5 have arrived without an assessment. Susie has overlooked the need to check for an assessment and complete one if necessary. The quality of the assessments that I have reviewed need improvement. Often, the assessments are incomplete and out-dated forms have been used. The assessments, in general, do not provide a reader with a thorough picture of the residents needs and interests.</p>
<p>2. DOCUMENTATION</p> <p>a. Completes initial and annual Activity Therapy Assessment forms completely and within established timelines.</p> <p>b. Accurately codes required MDS entries and within established timelines.</p> <p>c. Effectively Completes RAP notes.</p> <ul style="list-style-type: none">• Timely	<p>2 Rating/Comments</p> <p>Regularly scheduled documentation such as annual assessments and quarterly progress notes are usually timely. However, Susie frequently fails to check the documentation when residents are transferred or admitted directly to her unit. Susie took vacation during the entire month of Sept. and the required documentation for that month was not completed without supervisor intervention. This problem has been noted each of the last three years.</p>

CCSF 00008

I	Performance Criteria	II	Rating and Comments
	<ul style="list-style-type: none">Follows format <p>d. Effectively documents plan of care including</p> <ul style="list-style-type: none">Behavior specific problem statements.Measurable goals individualized for the resident.Specific, measurable interventions that include activities of resident preference.Appropriately links on to other care plan problems, goals, and interventions. <p>e. Completes quarterly notes as appropriate.</p> <ul style="list-style-type: none">Review of resident progress in relation to current plan of care.Resident involvement in activities and reaction to plan of care.General focus of future Activity Therapy interventions. <p>f. Completes transfer notes</p> <ul style="list-style-type: none">Review of current plan of careGeneral focus of future Activity Therapy interventions <p>g. Maintains resident participation records.</p> <ul style="list-style-type: none">Maintains daily participation records for assigned residents.Inform staff of resident participation in hospital-wide programs and special events.Ensures the transfer of participation records of to appropriate ward upon resident relocation		<p>July/Aug/Sept 2002=63% (0% for 9/02)</p> <p>Oct/Nov/Dec 2002=81%</p> <p>Jan 2003=70% (Missing assessments)</p> <p>Activity attendance records are maintained. However, it was noted if the IDT has had trouble locating the record when Susie is not on duty. Records should consistently be kept in the nurses' station to allow access for all staff.</p> <p>Susie has had difficulty with care planning. Problem statements, goals statements and interventions are frequently unrelated. Additionally, Susie has not been reviewing and modifying care plans appropriately. Susie often continues care plans instead of developing new goals and interventions. The care plans are often more than 6 month old. We spent much time in 8/02 revising care plans prior to Susies' vacation in Sept 2002. After the discussion of the care plans on D3, I noticed Susie was not translating the information into written form accurately. In all cases, the care plans, which I wrote with Susie, were not in the CP log. They were replaced with a CP Susie wrote and no longer conveyed what we had discussed. I have been alerted to the problem that Susie has been developing care plans in an area, which is outside the scope of Activity Therapy intervention and according to the NM, not a problem for the resident.</p>

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3. **PLANNING**
- a. Attends and participates in resident care conferences.
 - b. Prepares and maintains monthly calendars for assigned ward(s).
 - Calendars satisfy department and Title 22 requirements.
 - Calendars are prepared, approved, and distributed in a timely fashion.
 - Calendars are legible with good presentation
 - Changes to the calendar are reported to appropriate staff and documented.
 - c. Participates in the planning of floor based activities
 - d. Plans bus trips and community outings
 - Appropriately utilizes Bus Trip Planning form
 - Makes timely and appropriate food orders
 - Secures volunteers
 - Consults with IDT regarding concerns related to outings.
 - e. Participates in the planning and implementations of hospital-wide programs
 - f. Participates in the planning of special events

4. **IMPLEMENTATION**
- CCSF 00010**
- a. Implements ward-based activities.
 - Activities are stimulating
 - Activities are congruent with the resident interests
 - Activities contribute to resident functional status
 - Demonstrates the ability to adapt activities to meet the needs of residents.
 - b. Participates in the implementation of floor-based programs and activities
 - c. Participates in the implementation hospital-wide programs.
 - d. Satisfies department requirement for involvement in special event implementation.
 - e. Satisfies department requirement for implementation of bus trips and community outings

2 Rating/Comments

Susie attends all IDT and Prosocials meetings. Susie also attends monthly AT information exchanges and monthly cluster program meetings. Susie works hard to have the calendar completed for approval. I am pleased that Susie has been working on the Excel computer program, to improve the presentation of the small calendar. We are exploring ways of improving the presentation of the large calendar. I would evaluate Susie's performance as a 3 in these areas.

Susie completes the bustrip planning forms. However, often the RNs report the information is not communicated to them prior to the day of the trip. Susie needs to give a list of residents expected to participate the RN's at least two weeks prior to the event. Also, Susie has not been ordering lunch from the kitchen for the D3 shopping trips stating the residents prefer to purchase their lunch at the mall. On the 3/7/03 trip, resident did not have her own money to spend, requiring a volunteer to loan the resident money for lunch. Susie needs to ensure that residents have the resources to engage in all outings.

I have found inconsistencies in the small and large calendar with the two not matching. This has resulted in approved activities not being provided.

2 Rating/Comments

Susie has provided the required number of bustrips, hospital wide events and special events during this reporting period. The Saturday supervisor reports that Susie has been an asset to the Saturday staff during special events. Susie has been involved in the cluster, Moran Hall, programming for almost 9 months. Susie has been inconsistent in her support of these programs. Susie states, "Residents need to get out of the unit" when discussing programs with me. Unfortunately, the NM reports that in the IDT meetings, Susie stated "we were taking things away from these patients". Susie has stated that the residents don't want the changes, they would be confused or they will not leave their bedside. This inconsistent support and commitment has contributed to poor attendance in Mon, Wed and Fri. Moran Hall programs as documented in the MH attendance book. Susie has not performed to standard when facilitating the bingo in Moran Hall. Susie sits with RNs

residents who are not in need of assistance during the program. She does not assist residents who require assistance with their cards, call out the numbers or assist in the selection of prizes.

D3 residents are rarely referred to off-unit programs, (i.e. Art therapy, Hydrotherapy, ceramics, etc.). I have observed D3 residents spending much of their day sitting at their bedside. Much of the current program offered on the unit fail to contribute to the improvement of residents functional ability.

3 Rating/Comments

Susie assists in coordinating an intergenerational program monthly with success. Susie is encouraged to effectively engage volunteers to provide more services to a greater number of residents.

4 Rating/Comments

Susie attends all departmental inservices and staff meetings, and mandatory hospital inservices. Susie has been working regularly on a computer to learn the Excel program to develop her calendar. She is also making progress in learning to use the email system. She regularly works on the computer to increase her skills using email.

The psychosocial cluster has also had a number of trainings, which Susie usually attends including: prosocial exchanges between AT's monthly, Pathfinding, HIV information, etc.

5. SUPERVISION

Provides appropriate supervision and encouragement to volunteers and student interns.

6. STAFF DEVELOPMENT

a. Maintains and upgrades own knowledge, skills, and abilities by participating in:

- Mandatory hospital training sessions.
- Department inservice training program.
- Department staff meetings.
- Reviewing and providing appropriate input on policies and procedures.

7.

COMMUNICATION - COLLABORATION - COLLEGIALITY

- a. Communicates effectively with others by:
- Communicating in a constructive, non-judgmental manner.
 - Listening attentively and showing empathy.
 - Managing conflict by addressing issues in a manner that maintains good working relationships.
 - Communicates concerns to colleagues and supervisors promptly
- b. Contributes to the professional development of others by:
- Sharing knowledge and skills.
 - Providing and accepting constructive feedback.
 - Establishing collaborative practice with IDT members and other healthcare professionals.

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8.

PATIENT, VISITOR, AND STAFF RELATIONS & ETHICS

- a. Maintains and promotes a "customer service" philosophy by:
- Demonstrating good interpersonal skills.
 - Maintaining professional appearance and clean work space.
 - Cooperating with all levels of staff throughout the organization.
 - Demonstrating flexibility in adapting to changes to meet organizational mission and goals.
 - Respecting patient and employee rights.
 - Managing problems and concerns.
 - Communicating in a courteous and helpful manner.
- b. Supports autonomy, dignity, and rights of residents and others by:
- Preserving resident privacy and maintaining confidentiality of information.

2 Rating/Comments

Susie has difficulty with effective communication. During meetings Susie often appears uninterested or upset. She doesn't make eye contact. She covers her face, rolls her eyes and sits far from the group. There have been situations when Susie has turned her back on the person speaking.

In my supervision, when performance issues are discussed, Susie has difficulty problem-solving improvement. Susie has spoken of engaging a lawyer and made unprofessional statements and disclosure of information. In one case, I needed 3rd party from HR to mediate because she became very loud and uncooperative.

Follow through with individual treatment plans, which the team has decided to implement, has been insufficient. Susie has shared her discontent in regards to the treatment plans with other AT's during meetings. She has stated she would not follow "show of support" plan: increase their understanding of techniques used with the psychosocial population. Susie called in sick that day. She will need this training.

2 Rating/Comments

Susie has struggled with flexibility in adapting to changes in the treatment goals within the Psychosocial Cluster. Susie had been approached several times by many disciplines, in IDT meetings, planning meetings and specially set meetings, in order to accommodate other programs. While Susie did eventually make the requested changes, she had not supported the needs of other team members. Susie's last appraisal mentions a problem with the cleanliness of her cubicle space. This continues to be a problem and includes the orderliness of the supply cabinet on the unit. When spoken to about the issue, Susie deflects responsibility stating, "Look at everyone else's cubicles. They are just as bad."

Deflection of responsibility also is a problem when Susie has stated to residents, "I am only doing what I am told. My supervisor wants me to do this". The "selling" of new programs is ineffective when presented in this manner. Or when questioned about planning a party or a bus trip on the same day as other responsibilities, Susie has claimed the NM made a special request. This indicates that

<ul style="list-style-type: none">• Performing tasks in a non-judgmental, non-discriminatory manner that is sensitive to individual needs, cultural diversity, sexual orientation and personal limitations.	programs, (i.e. Valentine's Day Party 2/13/03, bustrip 1/16/03, both conflicted with the MH responsibility.) These requests appear that Sus may be attempting to avoid the Moran Hall responsibilities.
<p>9. USE OF EQUIPMENT</p> <ul style="list-style-type: none">a. Appropriately reserves equipment and supplies.b. Utilizes checkout procedures for equipment.c. Returns equipment in a timely fashion.d. Returns equipment clean and in good condition.e. Reports the needs for repair or replacement of equipment.	<p>3 Rating/Comments</p> <p>As appropriate</p>
<p>10. HEALTH, SAFETY, AND INFECTION CONTROL</p> <ul style="list-style-type: none">a. Adheres to health, safety, infection control policies and resource utilization standards by:<ul style="list-style-type: none">• Complying with employee health requirements.• Maintaining a clean and safe environment.• Adhering to and promoting safety practices and identifying and reporting hazards, including:<ul style="list-style-type: none">Using equipment safely and correctly.Using proper techniques to avoid work related injuries.• Using Universal Body Substance Precautions.b. Demonstrating knowledge of emergency response/disaster plan.c. Demonstrates proper food handling and safety techniques.	<p>3 Rating/Comments</p> <p>Susie is encouraged to arrange her cubicle to enhance the utility of her workspace.</p>

<p>11. PERSONNEL & PRODUCTIVITY</p> <p>a. Adheres to hospital/departmental personnel policies</p> <ul style="list-style-type: none"> • Sexual harassment, violence in the workplace. <p>b. Manages work time effectively, efficiently and productively by organizing and prioritizing work to maximize productivity.</p> <p>c. Reports unscheduled absences in a timely fashion</p> <p>d. Maintains appropriate level of attendance</p> <ul style="list-style-type: none"> • No more than 1 unscheduled absence per month on average. <p>e. Reports to work is a consistently punctual fashion</p>	<p>3 Rating/Comments</p> <p>Susie's attendance record is within normal limits. She is always punctual. Susie is encouraged to maximize her time management and productivity. Susie spends an unusually large amount of time completing documentation. This interferes with time spent with residents.</p>
<p>12. LEADERSHIP</p> <p>a. Participates in Performance Improvement activities.</p> <p>Makes appropriate suggestions for program development and the improvement of department practices.</p>	<p>3 rating/comments</p>

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III. Overall Evaluation Competent and Effective <input type="checkbox"/> Exceeds Standards <input type="checkbox"/> Outstanding <input type="checkbox"/> Development Needed <input checked="" type="checkbox"/> Unacceptable <input type="checkbox"/>	
IV. Work Plan for Next Report Period: See 3 Developmental Plans 1) planning skills, 2) implementation of activities and 3) documentation	
V. Recommendations: Susie has been with the City & County of San Francisco for more than 20 years. In the last 5 years, LHH has gone through vast changes requiring new knowledge and skills from the staff. Susie is encouraged to work closely with her supervisor to develop her ability to provide Activity Therapy interventions would compliment the work of the IDT while enhancing the quality of life, independence, and functional skills of the residents. Susie would benefit from increased flexibility and refraining from deflecting responsibility. Susie is encouraged to be aware of her body language and develop her ability to cooperate with the IDT and other hospital and department staff.	
VI. Reporting Manager	
1. NAME, WORK ADDRESS Christine Hanson 375 Laguna Honda Blvd SF, CA 94116	2. CLASS NO. AND TITLE HWIV 2588 3. DATE OF REPORT 6/1/02 - 3/15/03 4. CONFERENCE REPORT WITH (Manager's Signature) 5/6/03 5. SIGNATURE [Signature]
VII. Employee's Statement (See Handbook for Statement of Employee Rights) 1. <input type="checkbox"/> I AGREE WITH THIS REPORT <input checked="" type="checkbox"/> DO NOT AGREE WITH THIS REPORT: SECT. NO. 5-6-03 2. DATE OF COUNSELING INTERVIEW 5-6-03 3. SIGNATURE CERTIFIES I HAVE READ REPORT Susie [Signature]	
VIII. Reviewer's Certification 1. NAME, WORK ADDRESS WILLIAM G. FRAZIER 375 LAGUNA HONDA BLVD. SAN FRANCISCO, CA 94116 2. CLASS NO. AND TITLE DIRECTOR OF THERAPEUTIC ACTIVITIES 2557 3. DATE OF REVIEW 6/3/03 4. DATE OF CONFERENCE / INITIALS OF THOSE PRESENT WGF JFA 5. SIGNATURE [Signature]	
5. I CERTIFY THAT I HAVE REVIEWED THIS REPORT. I HAVE TAKEN THE FOLLOWING ACTION: SEE ATTACHED	

DEVELOPMENTAL PLAN

Employee: Susie Abram

Title: HWIII

Target Performance: Improved Implementation of Activities

Current Status: Susie is not contributing to the success of Moran Hall programs. She plans other activities to avoid participation in cluster programs, does not follow the protocol for the bingo program when facilitating, frames changes in a less than desirable manner to decrease the likelihood of residents and staff supporting the programs.

Goal: Susie will support MH/cluster based programs by

- Enlisting at least 4 residents from her unit per activity to participate in each program,
- Assist/transport residents to the programs daily,
- Remind staff and residents of the programs daily in the morning,
- Not plan activities that conflict with the MH activities,
- Begin transport 10-15 minutes prior to the beginning of the groups,
- Reviewing and following the Moran Hall bingo facilitation protocols.

Susie will frame information in a positive manner in order to decrease resident and staff resistance to changes in the program and encourage support by not putting responsibility onto others.

Comments: See Moran Hall activity protocols on the computer disk with 2003 calendars. One copy will be included with this plan.

Effective Date: ~~5/13/03~~ 7/1/03

Follow-up Date: ~~7/15/03~~ 9/1/03

Employee

Date

C. Hanson, CTRs 5/13/03

Supervisor

Date

Follow-up Did employee achieve Goal? ☐ Yes ☐ no

Comments:

Employee

Date

Supervisor

Date

DEVELOPMENTAL PLAN

Employee: Susie Abrams

Title: HWIII

Target Performance: Improved Planning Skills

Current Status: RN's have not had information about trips, residents have not had the appropriate resources to participate in trips, and calendars (large and small) have not matched.


Goal:

- Susie will communicate information about bustrips at least a week in advance to the RNs to ensure residents have adjusted medication schedules, funds for shopping, etc. 100% of the time.
- Susie will make sure the small and large calendars are the same a 100% of the time.
- Susie will follow the daily schedule of activities 90% of the time.

Comments: I would recommend discussing the trips in IDT where you can seek input. Have to copies of the bustrip form when getting the NM to sign the form and give her one, as well as put the information in the desk calendar.

Effective Date: ~~3~~ 5/13/03 7/1/03
 Follow-up Date: ~~7/15/03~~ 9/1/03

Employee_____
Date

 LTR 5/13/03
 Supervisor Date

Follow-up Did employee achieve Goal? ____ Yes ____ no

Comments:

Employee_____
Date_____
Supervisor_____
Date

CCSF 00017

DEVELOPMENTAL PLAN

Employee: Susie Abram
Title: HWIII

Target Performance: Timely and appropriate completion of required documentation
Current Status: Susie's rate of completing documentation has been unexceptionable, especially, during September, when she usually takes an extended vacation. Residents have transferred to the unit without assessments being complete, out-dated forms have been used and sections of the form have been left incomplete. Concerns about the accuracy of the MDS coding have been raised.

Goal:

- All documentation will be completed on time at least 90% of the time.
- Susie will complete all sections of the assessment form 100% of the time.
- The current form will be used for assessments 100% of the time.
- Susie will complete an initial assessment or transfer note within 7 days of admission to her assigned unit.
- She will keep the attendance book in the nurses' station.
- Susie will complete the MDS worksheet for assigned residents prior to her vacation.
- She will complete assigned documentation on residents who are due for review during vacation, either before or after the time off. And all documents will be completed within a month of her return from vacation.
- Susie will consult one IDT member before completing the MDS worksheet on residents due for review.

Comments: See documentation policy.

Effective Date: ~~5/13/03~~ 7/1/03

Follow-up Date: ~~7/15/03~~ 9/1/03

Employee	Date
<u>C. Hanson, CTRS</u>	<u>5/13/03</u>
Supervisor	Date

Follow-up Did employee achieve Goal? ☐ Yes ☐ no

Comments:

Employee	Date
Supervisor	Date

Moran Hall Program Protocols

Bingo Monday & Thursday

Goals: The goal of staff providing this program is to expand the residents "world", increase the number of residents engaging in programs off the units, Maximize staff productivity by allowing more residents to participate in an activity with a minimum of staff. This program replaces bingo programs previously provided on the 3rd floor units.

The following information is on what is expected of the staff person providing this program.

- 1:15---go to your unit; provide residents and staff with the activity information. (All other 3rd floor staff are responsible for informing their unit staff and residents about the program)
- Assist residents who are ready to the game in MH. You should be in MH by 1:45.
- At that time you remain in MH.
- You are expected to be handing out playing cards to residents.
- You are expected to arrange the back area for the residents you will be supervising (all of the 3rd floor residents who attend).
- You are expected to set residents up to enable them to assist each other.
- You should be available to assist the volunteers when folks call bingo by going to the resident, helping to identify the bingo and call it out to the volunteer for approval.
- Assist residents in choosing their prizes as appropriate.
- Take attendance in the 3rd floor MH attendance book.
- At the end of the game, collect cards and assist all 3rd floor residents back to their appropriate unit.

*All other 3rd floor staff should avoid planning groups on their units during bingo ~1:30-2:30.

*All other 3rd floor staff should be assisting their residents to the game unless in an IDT or the like. As well as, facilitate IDT assistance.

To: Christine Hansen

From: Susie Abram

Re: Job Performance

Date: May 13, 2003

Thank you for allowing me the opportunity to respond to the job performance of 6/02- 3/03.

The first area of concern is the assessment. I have tried to accurately code the MDS. I'm sorry the D3 staff believed that the resident's involvement in activities were overestimate. My time with the resident and the resident's involved in activities were based upon the starting time and ending times as provided by the D3's wall clock. As per the assessments, I have written and placed the needed material for assessments in the proper place. The assessment forms used were the that were provided. It was stated that a through picture of the resident's need and interest wasn't provided. Maybe as the supervisor, Christine Hansen, a workshop could be conducted outlining what makes an appropriate assessment.

The next area of concern was documentation.

What has always been apart of the required regularly documentation: admitting into or transferring out of Ward D3 as been part of timely progress material. My vacation has always been for the entire month of September. I'm glad that the supervisor was able to help reach the goal. If it is okay complete the MDS material a month before the required date, please put this in letter form, and I will complete the MDS documentation a month before my vacation. Please accept my apology.

The third area of concern is the planning.

Before events are written on the large calendar, I must talk and meet with the Nurse Manager. The Nurse Manager must give her approval for the new month's activities. During the community meetings on Thursdays, the residents and the CNA of D3 and myself will discuss and plan the next bus trip. The residents had voted to purchase with their own "monies" food away from the hospital's food. This item of having their own monies applied only to the shopping mall trips. The nursing staff takes the patient to "Patient Accounts" for the personal monies.

The fourth area of concern was implementation. I have always and will continue to support all activities to enhance the resident's life. The statement, "we are taking things away from the patient." only applied to the bingo that was played on Fridays, on Ward D3. My commitment and support has been for residents. I'm off on Mondays. The dates Wednesday and Friday, I'm asking and telling the staff and the residents to come to Moran Hall. Many of the residents refuse and wish to remain at the bedside. On Thursdays, I will sit at a back table with the Ward D3 residents who feel more secure being near me. When residents at different tables (several other back tables) call "bingo", I will call out the winning numbers. The volunteers who come to the Moran Hall on Thursdays feel somewhat threat if members of the Activity Departments call the bingo numbers or pass out the prizes to the residents. I will continue to be work toward the goal of what enhances and enriches the resident's life. Please demonstrative the

CCSF 00020

correct procedure that would increase my job performance to service.

The fifth area of concern was communication. During my twenty-two years of service, I have strived to meet and exceed the goal of effective communication. During the meetings, all my attention is focused

on the topic(s) of the meetings, and the speaker delivering the message of the meeting. I have directed

eye contact with the speaker. Once when my front tooth was loose and finally came out of my mouth

and, I asked the supervisor, Christine Hansen, to please excuse me, "I'm embarrassed that my right front tooth is missing." Problem-solving improvements are issues that I'm willing toward reaching a goal. I'm sorry that to mention the word "lawyer" caused a problem. I'm wanting someone to be in my corner. I had thought that, as a supervisor, Christine Hansen, could and would be fair and want the best for her employees. I'm sorry that my calling in sick on 11/20/02, caused a problem. A safety training is still needed. Would the supervisor, Christine Hansen, please conduct the meeting or make arrangement for the needed training. It is not true that I was loud and uncooperative and a 3rd party from HR was needed.

The sixth area of concern was patient, visitor and staff relations. I want to support the need of others team members. The plans that made by the Psychosocial Cluster have become apart of the program that best meets the needs of the resident. The cleanliness of the cubicle space and the orderliness of the supply cabinet on the ward are places that I feel the most relax, in these areas, it may seem as if orderliness isn't present, but I know and find everything that I need. The deflection of responsibility is stated as a problem. After telling and encouraging the residents to try new things, as a last resource, I would tell the residents let's try the new item my boss speaks highly of the things.

Attachment to performance appraisal

Susie Abram refused to sign the developmental plans. She stated that she already does all of the items and doesn't feel comfortable signing the document. However, I informed her that I would begin evaluating her on the plans and follow up dates are included in the plans. Susie has copies of all documents.

Christine Hanson
5/13/03

CCSF 00022

By: William G. Frazier
Re: Result of Performance Appraisal Reviewer Conference with Susie Abram
held on June 13, 2003
Date: July 14, 2003

Susie Abram and I met on June 13th, at 1:00 p.m. to discuss her concerns related to her annual performance appraisal. Ms. Abram expressed several concerns about the accuracy of the performance appraisal and concerns that she had related to the supervision she was receiving from her supervisor, Christine Hanson. I committed to discussing those concerns with Ms. Hanson.

Susie and I discussed the changes taking place within the organization and the changing nature of Activity Therapy interventions and responsibilities. I indicated my support of the efforts being taken by Christine to improve the services and therapeutic benefits of Activity Therapy program within the Psychosocial Cluster. I encouraged Susie to make a clear effort to comply with Christine Hanson's direction and to reciprocate support for the program enhancements within the cluster. I encouraged Susie to contact me when she felt that she is being treated unfairly so that the issues can be resolved immediately.

In the spirit of cooperation, I am asking Christine to adjust the dates of the developmental plans to take effect on July 1, 2003.

*Changes were made. C. Hanson, CTRS
7/14/03*

EXHIBIT G

To: Susie Abram
From: Christine Hanson *CP*
Date: 5/9/03
RE: Restaurant outing to Chevys

I went ahead and completed the receipts for the trip to Chevys you took the D3 residents on 5/2/03. I completed the form for the staff lunch receipt and included \$1.98 of my money to cover the amount over the allotment the staff lunches cost. I need you to pay me the \$1.98. I have included a copy of the gift fund reimbursement form for your review.

There is another issue that must be addressed regarding this trip. I am not sure you understand the money and receipts are your responsibility. The receipt for residents lunches includes a hand written amount for desserts. This is not acceptable. I called the restaurant for clarification. They informed me all items on the receipts should be itemized by computer. When I inquired about the situation, you told me the driver had done the writing on the receipt. All receipts and funds are your responsibility. In the future, if there are problems with receipts, you will be held accountable.

EXHIBIT H

EMPLOYEE Susie Abram		CLASS HWIII, 2587	
DEPARTMENT/WORK LOCATION DPH/LHH/Activity Therapy			SHIFT Days
HOURS 8:30-5pm	DAYS OFF Sunday-Monday	SUPERVISOR Christine Hanson	TITLE HWIV, 2588
YOU ARE SCHEDULED FOR A CONFERENCE ON:		DATE:	TIME:
			PLACE:

YOU HAVE THE RIGHT TO REPRESENTATION AT THIS CONFERENCE

HAS CONFERENCE BEEN HELD WITH EMPLOYEE PREVIOUSLY REGARDING DISCIPLINARY PROBLEMS? YES ☒ NO ☐

SUBJECT(S), DATE, AND DISPOSITION OF PRIOR CONFERENCE(S)	1 12/11/03 Inattention to duty and insubordination Written warning	2	3	4
--	---	---	---	---

LIST CHARGE(S): Inattention to duty; Not professionally managing a cluster wide activity and dishonesty providing information to your supervisor

SUBJECT(S) OF THIS CONFERENCE: On 7/24/03, the 3rd floor had a summer/garage sale. Each unit had a table and was accountable for their own money. When I observed the sale, I noted that your table was very disorganized and messy. In fact, appeared uninviting to potential buyers. I was informed that after the sale you failed to clean up after yourself and other staff for you. They felt if they left the mess, it would reflect badly on the 3rd floor in general.

I approached you at the end of the day and asked you how the sale went. You responded by not making eye contact, pulling the sucker out of your mouth and said, "fine", and returned the sucker to your mouth. I felt shut off and didn't inquire any further.

Since you were not forthcoming with information about information, I decided that it would be best to collect the funds from all individuals with responsibility during the sale. On Tuesday, 7/29/03, I asked you to be prepared to turn in the funds from the sale the following day. You were resistive, but told me, "I'll give you the measly \$30 we made". Wednesday afternoon you came to my office, counted out some money and returned it to the small bag you were carrying it in. You told me there was \$50. You stated you had spoken with the IDT and were planning to get a DVD player for the unit while I was on vacation and would need the money. I was very happy you had been speaking with the IDT on how to spend the funds and was happy to allow you to keep the funds to purchase the item.

However, that evening I spoke with D3 NM, G Davary. She informed me that when you had spoken with her there was not mention or decision to purchase a DVD player. She also informed me that you had told her I requested half of your money the unit had earned during the sale, \$50, and that you could spend the other half for the unit. You never gave money to me. Furthermore, the NM reported that you claimed to have made \$100 on the day of the sale. You reported the same amount, \$100. Lisa Randon-Walker on 7/25/03, the day following the sale.

With all of the conflicting numbers and stories, I can not be sure what you made during the sale. Nor am I confident you would tell me the truth. Whatever the amount, your management of this activity and corresponding funds have been grossly inadequate.

Because of the above information, I am recommending that there be a 2-day suspension for the inattention to duty and dishonesty.

Attachments:

☐ Employee Copy

☐ Department Copy

☒ File Copy

CCSF 00298

NAME

CHARGE(S):

NOTIFICATION DATE:

EMPLOYEE'S STATEMENT (OPTIONAL):

STATEMENT TO BE GIVEN TO
CHRISTINE BY 10/22/03

ACTION BY IMMEDIATE SUPERVISOR

Statement attached

ACTION RECOMMENDED:

☐ DISCIPLINARY
WARNING

DISCIPLINARY
SUSPENSION

2
DAYS

☐ TERMINATION/
DISMISSAL

☐ OTHER, SPECIFY: _____

I ACKNOWLEDGE THIS CONFERENCE, WHILE NOT NECESSARILY AGREEING TO THE ABOVE ALLEGATIONS;

10/16/03
DATE OF CONFERENCE

[Signature]
EMPLOYEE SIGNATURE

[Signature] CRS
SUPERVISOR SIGNATURE

COPY OF CONFERENCE FORM:

X GIVEN TO EMPLOYEE 10/16/03
DATE

☐ SENT CERTIFIED
MAIL

DATE

YOU MAY REQUEST A REVIEW OF THIS RECOMMENDATION TO THE REVIEWER BY 10/24/03
10/10/03
(Date)

William Frazier, Director of Therapeutic Activities
NAME AND TITLE OF REVIEWER
(Division Head or Designee)

☐ Employee Copy

☐ Department Copy

☐ File Copy

CCSF 00299

Rebuttal to employee conference on 10/16/03

I disagree with the charges listed on the employee conference form. I am working very hard to meet the various needs of the residents that I work with. The specific statements listed on the conference form are inaccurate. I feel that this supervisor has biased expectations. This supervisor has never given me any positive feedback. I feel that she is prejudiced against me.

CCSF 00300

Inattention to duty 10/16/03

The conference for the inattention to duty for Susie Abram occurred on 10/16/03 at 10am. In attendance were Susie Abram, Ruben Garcia and Christine Hanson. During the meeting Susie and Ruben explained that the discrepancy with the money occurred because Susie was part of the sale here at the hospital, but also had a sale of her own at her home.

Susie stated she had made approximately \$53.00 here at LHH, (This is different amount than what was reported when asked to turn in her money) and another \$54.00 at her home, which she has donated to the unit. That was her reason for the difference in the amounts.

She explained the residents were part of the process in spending the money and in the end decided to have a party. Susie presented 2 receipts and claimed that there is about \$36.00 remaining.

Ruben asked that the charges be dropped due to the lack of a policy at the time of the incident. Supervisor explained that there is a policy in professionally handling money and implementing programs, both of which Susie failed to follow. And because of this situation, guidelines have been established for future sales.

Also, Supervisor presented other attachments. First was a written statement from the nurse manager from D3. The second two items were documents from the past where Susie had been counseled for not paying attention to detail when reporting use of hospital funds. One was a bustrip and the other was a ward-monthly fund.

I continue to believe that a 2-day suspension is appropriate in the situation.

DEPARTMENT OF PUBLIC HEALTH

REVIEWER

PAGE 3

NAME	CHARGE(S):	NOTIFICATION DATE:
Susie Abram	Inattention to Duty	8/21/03

REVIEW AND RECOMMENDATION BY REVIEWER

A review meeting was held on Thursday, November 4th, at 1:00 p.m. in room B104 at Laguna Honda Hospital. In attendance were Susie Abram, SEIU Local 790 representative Jonathan Frank, and myself, William Frazier. The purpose of the meeting was to review the charges of inattention to duty and dishonesty, which were made by Activity Therapy Supervisor, Christine Hanson. The original employee conference was held in October of 2003 after which, Ms. Hanson had recommended a two-day suspension. The review meeting had originally been scheduled for November 13th, 2003, but Ms. Abram became ill and was unable to participate. Ms. Abram subsequently took a leave of absence from that day until September 17th of 2004.

The meeting began with my explaining the purpose of the meeting and the reason for the delay between the original employee conference and the review meeting. Mr. Frank sought clarification on many points, as he was not familiar with the issues. After receiving that clarification, Mr. Frank indicated that he felt the issue was related to a lack of communication between Ms. Abram and her supervisor and that the recommendation of a two-day suspension was excessive. I explained that the two-day suspension was recommended in consideration of progressive discipline as Ms. Abram was given a written reprimand for a charge of inattention to duty and insubordination in December of 2002.

The discussion turned to the discrepancy over the amount of money that Ms. Abram reported to different people from a rummage sale sponsored by the Activity Therapy staff from the third floor. Ms. Abram explained that she had reported different amounts to different people because she had made money at a garage sale at her home. She had intended to donate that money and add it to the money that was made at the rummage sale at the hospital. Ms. Abram had reported a lesser amount to her supervisor and a greater amount to the Nurse Manager from her assigned unit and another Activity Therapy staff member. The greater amount was a combination of the money made at the hospital and the money made at home. This had apparently been the discussion at the original employee conference.

It is apparent that a great deal of miscommunication has taken place in regards to this case. The discrepancy between the larger amount of money reported to the Nurse Manager and the smaller amount reported to the Activity Therapy Supervisor is explained by the additional sale that Ms. Abram claims to have held at her house. However, that information did not come out until the employee conference. The employee conference documentation indicates a several different amounts of money reported by Ms. Abram at different times in the process. (\$30, \$50, \$53, and \$100). There was an apparent lack of clarity about what would be purchased with the funds including a DVD player or a part for the unit. At the review meeting, Ms. Abram also reported that a trip to a casino was also being considered. There was also conflicting information about how that determination would be made either by the IDT or the residents themselves.

At the review meeting, Ms. Abram was adamant that her handling of the situation was appropriate and that Ms. Hanson was perpetuating conflict between the two. It is my opinion that Ms. Abram is at least responsible for a portion of the miscommunications, but she fails to acknowledge that or accept responsibility.

I do not believe that Ms. Abram kept any of the money for herself or intended to do so. It was within the proper authority and responsibility as a supervisor for Ms. Hanson to question Ms. Abram about funds related to a program sanctioned by the Activity Therapy Department.

CCSF 00302

Based on the information that I have before me, I recommend a one-day suspension for inattention to duty, since Abram failed to effectively communicate with her supervisor on this matter and did not take steps to clarify the miscommunication.

ACTION RECOMMENDED:

☐ DISCIPLINARY
WARNING

☒ DISCIPLINARY
SUSPENSION 1
DAYS

☐ TERMINATION/
DISMISSAL

☐ OTHER, SPECIFY: _____

11/4/04

DATE OF REVIEW

SIGNED: _____

REVIEWER (NAME AND TITLE)

*approved
mtd 11/4/04*

DIRECTOR OF THERAPEUTIC ACTIVITIES

COPY OF CONFERENCE FORM:

☒ GIVEN TO EMPLOYEE 11/19/04 OR
DATE

☐ SENT CERTIFIED
MAIL

DATE

☐ Employee Copy

☐ Department Copy

☒ File Copy

To: Susie Abram
From: Carstine Hanson
Date: 10/7/03
RE: conference

On 8/21/03, you received notification of a conference. That conference was postponed due to vacations. Therefore, we need to reschedule. Next week, I have Tuesday, 10/14/03 or Thursday 10/16/03 between 9-11am both days. Please, contact your union representative for his availability and get back to me by 10/16/03. You may leave me an email, voice mail or note in my box.

If I don't get a response from you by the 16th, I'll need to set the date for the conference and will not be able to reschedule. If you have problems with representation, the two people able to represent you in the department are Norman Burns and Ann Wang. The union has a conflict resolution center which you may also access, 575-1740.

Date: 5/2/03

To: Accounting Department

From: Christine Hanson
Print Name

472-045
Telephone

COPY

Reimbursement Amount: \$ 178.76

Check payable to: LHM - Activity Therapy

Request to be funded from:

- a. Nursing ☐
- b. ADHC ☐
- c. Volunteers ☐
- d. Activity ☐
- e. AOB ☐
- f. Hospital Care ☐

Fund: Miscellaneous General
Index Code: 80000000
Sub-Object: 0000
GrandTotal: 178.76

g. Other LHM Express ☒

Reason for Expenditure: Susie assisted 10 Residents from DB to Chevys Restaurant for lunch

Person's Name (if applicable)

- | | | |
|-----------------------|-----------------------|--------------------|
| 1. <u>L. Kypgofou</u> | 5. <u>B. Nicto</u> | 9. <u>H. Welch</u> |
| 2. <u>B. Woods</u> | 6. <u>C. Shepherd</u> | 10. <u>S. Head</u> |
| 3. <u>C. Santiago</u> | 7. <u>S. Bayer</u> | 11. _____ |
| 4. <u>K. Lyons</u> | 8. <u>S. Huston</u> | 12. _____ |

Requested by: [Signature]
Authorized Employee

Date: 5/9/03

Approved by: _____

Division Head

Date: _____

Approved by: _____

Controller

Date: _____

Note: Original receipts must be attached.

Control

CCSF 00305

 CK # 486 DATE 05/02/0
 LE # 45 TIME 12:1
COPY
 I-MINING NELSON

ITEMS ORDERED	AMOU
1 LICY KINGS	6.99
2 FM TWO COMBO	13.96
1 OTHER SIDES, Tomalito	0.95
1 DIET P	1.99
1 LMADE	1.99

SUBTOTAL	25.90
TAX	2.14
TOTAL DUE	28.04
	<u>3.90</u>
# OF GUESTS	31.94

NEED SOMEWHERE TO HAVE YOUR OFFICE
 PARTY? JOIN US AT CHEVYS FOR A FUN AND
 PORTING EVENING. ASK FOR THE MANAGER

PER POLICY, STAFF MEMBERS
 ARE ALLOTTED NO GREATER
 THAN \$10.00 PER MEAL. THESE
 RECEIPTS REPRESENTS:
 3 # of Staff X \$10.00 = **30 TOTAL**
 Signature & Date *5/9/03*

 CHECK # 478 DATE 05/02/0
 TABLE # 44 TIME 12:1

I-MINING NELSON

ITEMS ORDERED	AMOU
1 GUAC SMALL	2.99
1 FM FAJ BEV	8
3 FM FAJ CK	25
4 FM TWO COMBO	27
1 FM FAJ RIO BE	7.22
1 FM RELLENO COMBO	7.99
5 COFFEE	9.95
4 PEPSI	7.96
1 ROOT B	1.99
2 VIRG STRAW MING	5.50

SUBTOTAL	106.79
TAX	8.82

TOTAL DUE 115.61
 tip 16.05
 # OF GUESTS **31.649**

Desert
 NEED SOMEWHERE TO HAVE YOUR PARTY? JOIN US AT CHEVYS FOR A FUN AND
 PORTING EVENING. ASK FOR THE MANAGER
 TO BOOK YOUR PARTY TODAY.

Total \$ 148.76
31.94
180.70

To: Susie Abram
From: Christine Hanson *CH*
Date: 5/9/03
RE: Restaurant outing to Chevys

I went ahead and completed the receipts for the trip to Chevys you took the D3 residents on 5/2/03. I completed the form for the staff lunch receipt and included \$1.98 of my money to cover the amount over the allotment the staff lunches cost. I need you to pay me the \$1.98. I have included a copy of the gift fund reimbursement form for your review.

There is another issue that must be addressed regarding this trip. I am not sure you understand the money and receipts are your responsibility. The receipt for residents lunches includes a hand written amount for desserts. This is not acceptable. I called the restaurant for clarification. They informed me all items on the receipts should be itemized by computer. When I inquired about the situation, you told me the driver had done the writing on the receipt. All receipts and funds are your responsibility. In the future, if there are problems with receipts, you will be held accountable.

Lisa Randon

08/03/2003 02:00 PM

To: Christine Hanson/DPH/SFGOV
cc: William Frazier/DPH/SFGOV
Subject:

Per our conversation:

On July 25, 2003, I had a conversation with Susie Abram and Lynn Lustgarten regarding the sale that they had on the 3rd floor earlier during the month. We were discussing how well the sale went. Lynn expressed that she had made around \$100.00 and Susie added that she had also made around \$100.00. The conversation went on to what the money would be used for. Susie said that the decision regarding the money would be left up to her residents.

Lisa Randon-Walker

CCSF 00308

Ghodsai Davary

To: Christine Hanson/DPH/SFGOV

08/26/2003 09:39 AM

cc:

Subject: Re: 3rd Floor Sale

On afternoon of July 25th, 03, when I asked Susie Abram how much she has made during the Sale, She told me \$100.00. In another conversation with Susie Abram prior to our IDT Meeting about a week after the Sale, She was discussing with me Residents' wishes for the money she had made. At this time She said she has only \$50.00, and the rest of it was given to Cuddy.

Goldie Davary, N.M E3, G3

CCSF 00309

Laguna Honda Hospital Volunteers Revolving Fund
Ward Money Replenishment Request

Ward D3

Month Covered: March

Activity Therapist [Signature]

TOTAL DOLLAR AMOUNT GIVEN

\$45.00

AMOUNT EXPENDED

45.00

CASH REMAINING

ITEMS PURCHASED:

Food for baby group

NUMBER OF RECEIPTS ATTACHED: 5

I certify that the above items were purchased for use in the Activity Therapy Programming on the above stated ward at Laguna Honda Hospital. I understand I will not be compensated over and above the monthly amount of \$45.00 for my ward purchases.

[Signature]
Signature of Activity Therapist

3/25/03
Date

[Signature]
Activity Therapy Supervisor
Approved for Replenishment

3/27/03
Date

D-3

3-11-03

12:05

0 43

000000

00 96.

-153.10

no 21

07 2

5.98

no 1

98

159.08 TL

-5.98 TAE

.051 TKE

.600 I

no 23.

159.59 #

no 23.

159.59

no 23.

159.59 CA

no 4.

-13.35 # VD

no 15. H

no 1. # x

159.59 CAID

... 0125.38

(S) SAFEWAY

WELCOME TO SAFEWAY

MH CRND FLAT	8.19 F
2 74 1b @ 1.79 /1b = 4.90	
SC 7627 CLUB MH CRND FLAT	3.29-F
SFWY BRISKET POINT	8.80 F
3 68 1b @ 1.29 /1b = 4.75	
SC 875 CLUB SFWY BRISKET	4.05-F
20.71 LEMON JUICE	1.58 F
202.59 CAKE MIX-YEL	5.18 F
2 @ 1.34	
SC 6852 CLUB PILLSBURY CAK	2.68-F
203.29 PLSBRY PIE CRUSTS	6.58 F
202.59 SAND MUFFIN	5.18 F
HAIR PINS	2.99 T
**** TAX .25 BAL	28.73
VF PERSONAL CHECK	28.73
CHANGE	.00

TOTAL SAVINGS 10.02
3/10/03 11:37 1259 06 0064 9249

SUSIE ABRAM

8100

Club Card Savings \$ 10.02
Total Savings Value 26% \$ 10.02

Your qualifying purchases have been accumulated towards eScrip. Thank you.

Watch for Fridays on Bravo Network
great independent films commercial
Free. Three Friday nights in March

BUY TURBOTAX DELUXE NOW!
\$10 Rebate FREE eFile & TurboTax State
At selected stores. Restrictions apply

YOU HAVE PURCHASED 0 OF 8 TOWARD
YOUR 1st FREE BAGEL
See Store for Details.

YOU HAVE PURCHASED 0 OF 7 TOWARD
YOUR 1st FREE DELI SANDWICH
See Store for Details.

LET US HEAR FROM YOU!
1-877-724-3429 or visit SAFEWAY.COM

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FRUIT BARN
111 QUALITY SIDE
PRODUCE & HEALTH FOODS
415 469-8010

03-04-2003 TUE 11

PRODUCE 1.39
01.35 116 1.29/16

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CCSF 00311

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SAFEWAY

WELCOME TO SAFEWAY

MH CRND FLAT	8.19 F
2.74 lb @ 1.79 /lb = 4.90	
SC 7627 CLUB MH CRND FLAT	3.29-F
3.68 lb @ 1.29 /lb = 4.75	8.80 F
SC 875 CLUB SFMY BRISKET	
28.79 LEMON JUICE	4.05-F
282.59 CAKE MIX-YEL	1.58 F
2 @ 1.34	5.18 F
SC 6852 CLUB PILLSBURY CAK	
283.29 PLSBRY PIE CRUSTS	2.68-F
282.59 SAND MUFFIN	6.58 F
HAIR PINS	5.18 F
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UF 25 BAL	28.73
PERSONAL CHECK	28.73
CHANGE	.00

TOTAL SAVINGS 10.02
3/10/03 11:37 1259 06 0064 9249

SUSIE ABRAM

8100

Club Card Savings \$ 10.02
Total Savings Value 26% \$ 10.02

Your qualifying purchases have
been accumulated towards eScrip.
Thank you.

Value: Indie Fridays on Bravo Network
great independent films, commercial
Free, three Friday nights in March

BUY TURBOTAX DELUXE NOW!
\$10 Rebate + FREE eFile & TurboTax State
At selected stores; Restrictions apply

YOU HAVE PURCHASED 0 OF 8 TOWARD
YOUR 1st FREE BAGEL
See Store for Details.

YOU HAVE PURCHASED 0 OF 7 TOWARD
YOUR 1st FREE DELI SANDWICH
See Store for Details.

LET US HEAR FROM YOU!
1-877-724-3929 or visit SAFEWAY.COM

FRUIT BARN
111 QUALITY STORE
PRODUCE & HEALTH FOODS
415 469-8110

03-24-2003 TUE #1

PRODUCE	1.37
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CCSF 00312

Sun - 10:15 Cath Service.

Mon - 1:30 Bingo Moran Hall

Tues -

Wed - Education group 2pm Moran Hall

Thurs - 10 AM Community meeting

1:30 Bingo Moran Hall

Fri - 2pm Blackjack Moran Hall

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EXHIBIT I

EMPLOYEE Susie Abram		CLASS HWIII, 2587		NOTIFICATION DATE 10/16/03	
DEPARTMENT/WORK LOCATION LHH/Activity Therapy				SHIFT Days	
HOURS 8:30-5pm	DAYS OFF Sun-Mon	SUPERVISOR Christine Hanson		TITLE AT supervisor	
YOU ARE SCHEDULED FOR A CONFERENCE ON: Thursday		DATE: 10/23/03	TIME: 10am	PLACE: B104	
YOU HAVE THE RIGHT TO REPRESENTATION AT THIS CONFERENCE					
HAS CONFERENCE BEEN HELD WITH EMPLOYEE PREVIOUSLY REGARDING DISCIPLINARY PROBLEMS? YES <input checked="" type="checkbox"/> NO <input type="checkbox"/>					
SUBJECT(S), DATE, AND DISPOSITION OF PRIOR CONFERENCE(S)	1 12/11/02 Inattention to Duty and Insubordination	2 10/16/03 Inattention to Duty	3	4	

LIST CHARGE(S): Inattention to Duty, specifically, 1) failure to meet goals of your development plan and 2) failure to follow through with planned activities.

SUBJECT(S) OF THIS CONFERENCE: Before beginning to explain the need for this conference, I think it is necessary to note that the developmental plans (see attached) were created in response to the performance appraisal completed in June. Susie exercised her right to have the director of Activity Therapy review the appraisal and developmental plans. Therefore, the developmental plans are from 7/1/03 to 9/1/03. The union representative, Rub Gracia, was informed about the corrective action prior to Susie's vacation in September. He requested that the conference be postponed until her return in October. The following situations are examples of failure to meet developmental plan goals,

- Improve Planning skills - Susie will follow the daily schedule of activities at least 90% of the time, complete out planning forms 2 weeks in advance, per policy.
- On 7/2/03 preparation for the 3rd of July event was not completed, as instructed. (See attachment)
- On 7/3/03 because Susie was not prepared for the event the day before, she was not able to assist with the set up for the 3rd floor party in the afternoon. The balloons she held on to had to be prepared by volunteers moments before the party. Susie was on the 4th floor most of the morning, which was not part of her assignment. And she arrived 10 minutes late to the 3rd floor party in the afternoon.
- On 7/9/03 the movie was not on for the residents to watch while you were in Rounds each week. This occurred each week throughout the observation period.
- On 7/10/03 I visited the unit at 11:30, Susie was in the dining room with the social worker, and the door was closed. Scheduled was exercise. It was not happening. Prior to this day, Lucy Fisher approached the issue of extended time in the dining room in our planning meeting. Susie stated it was not a problem and that you had been doing it this way for a long time. In actuality, it was a problem and she failed to stay on schedule. (See Attachment of schedule which Susie agreed to in the planning meeting with the D3 nurse manager, the nursing supervisor and myself).
- For the Picnic bustrip on 7/17/03, the Outing planning form was not completed 2 weeks in advance. Barbara asked me for the form 2 days prior to the trip.

CCSF 00107

Alan 3-4-05

4th of July DutiesVictoria

On the 2nd, distribute decorations to main building floors (give copies of the food orders), and clear off your cart that way we can decorate it. Decorations= 1 box in the soda room, 2 boxes in my office.

Norman

On the 2nd, decorate 2 carts and load them up with games from the b-wing (ring toss, wooden games, balloon V-ball, etc.).

On the 3rd, assist w/ balloons 8:30-9:15, 9:30 pick up volunteers (Information w/ John). You will be escorting the volunteers and the 2 games carts to the following areas; 10:30-11:00 5th floor, 11:10-11:40 4th floor.

Susie

On the 2nd, decorate 2 carts and load them up with games from the B-wing (toss across, wooden games, balloon V-ball, target games, etc)

On the 3rd, assist w/ balloons 8:30-9:15, 9:30 pick up volunteers (information w/ John). You will be escorting the volunteers with the game carts to the following floors; 11:00-11:30 6th floor, 11:40-12:10 7th floor.

Susie and Norm

You will need to organize a couple of carts to take with you to the 3rd floor for the afternoon. We have pumps for the balloons to make balloon animals. I'll give them to you for the game carts along with some of the special balloons. Please check with Bob about volunteers for the afternoon. You will need to organize picking them up.

DEVELOPMENTAL PLAN

Employee: Susie Abrams
Title: HWH

Target Performance: Improved Planning Skills

Current Status: RN's have not had information about trips, residents have not had the appropriate resources to participate in trips, and calendars (large and small) have not matched.

Goal:


- Susie will communicate information about bustrips at least a week in advance to the RNs to ensure residents have adjusted medication schedules, funds for shopping, etc. 100% of the time.
- Susie will make sure the small and large calendars are the same a 100% of the time.
- Susie will follow the daily schedule of activities 90% of the time.

Comments: I would recommend discussing the trips in IDT where you can seek input. Have to copies of the bustrip form when getting the NM to sign the form and give her one, as well as put the information in the desk calendar.

Effective Date: 3 ~~5/13/03~~ 7/1/03
Follow-up Date: ~~7/15/03~~ 9/1/03

Employee

Date

 J. Larson, LTR
Supervisor

5/13/03
Date

Follow-up Did employee achieve Goal? Yes ☐ No ☐

Comments:

Employee

Date

Supervisor

Date

CCSF 00109

To: Susie Abram
From: Christine Hanson
Date: 10/29/03
RE: Employee statement

The date noted in the conference for an employee statement was 10/28/03. That date has passed. Therefore, I have copied the paperwork for you as is and forwarded the original to William Frazier. Please note the request for an appeal deadline is 10/31/03.

CCSF 00110

DEVELOPMENTAL PLAN

Employee: Susie Abram
Title: HWH

Target Performance: Timely and appropriate completion of required documentation
Current Status: Susie's rate of completing documentation has been unexceptionable, especially, during September, when she usually takes an extended vacation. Residents have transferred to the unit without assessments being complete, out-dated forms have been used and sections of the form have been left incomplete. Concerns about the accuracy of the MDS coding have been raised.

Goal:

- All documentation will be completed on time at least 90% of the time.
- Susie will complete all sections of the assessment form 100% of the time.
- The current form will be used for assessments 100% of the time.
- Susie will complete an initial assessment or transfer note within 7 days of admission to her assigned unit.
- She will keep the attendance book in the nurses' station.
- Susie will complete the MDS worksheet for assigned residents prior to her vacation.
- She will complete assigned documentation on residents who are due for review during vacation, either before or after the time off. And all documents will be completed within a month of her return from vacation.
- Susie will consult one HLT member before completing the MDS worksheet on residents due for review.

Comments: See documentation policy.

Effective Date: ~~5/13/03~~ 7/1/03

Follow-up Date: ~~7/15/03~~ 9/1/03

Employee

Date

[Signature]
Supervisor

5/13/03

Date

Follow-up: Did employee achieve Goal?

Yes ☐ No ☐

Comments:

Employee

Date

Supervisor

Date

CCSF 00111

Case 3:07-cv-03006-PJH Document 19 Filed 05/14/2008 Page 74 of 80
... later that afternoon Susie assisted a resident back to the unit during music therapy around 2:20. I not see her return, nor was she on the unit at 3:30 when I went to return residents from the sacred altar project. Susie's time from approximately 2:30-5pm is unaccounted for.

- On 7/31/03 Susie was observed in the department at 9:30am. Thursdays Susie has agreed to be on the unit by 9-9:15 to facilitate a news group.
- On 8/11/03 I had returned from a vacation. In my absence, Susie needed to get the backup supervisor, Christ Serzant, to approve the D3 August calendar per policy. I looked for the calendar when I returned, and found in the book, unapproved. I brought this to Susie's attention during our supervision meeting on 8/12/03. The reason she gave for the calendar not being compliant was ~~she~~ ^{you} thought it had been approved. I explain that it had not been. The calendar remains unapproved, and doesn't meet the departmental standards. (See Attachment)
- On 8/20/03 Barbara approached me for the D3 outing planning form. The outing was scheduled for the next day. Later she brought the form to me for my signature. Susie didn't follow procedures to get the outing approved, nor did she complete it in a timely manner.

I visited D3 approximately 2 times per week from 7/1/03-8/28/03, (from 7/31/03-8/10/03 I was on vacation). That is approximately 12 visits. During those visits I never saw Susie implementing an activity on D3. Clearly Susie was not able to meet the goal of 90% of scheduled activities implemented noted in the developmental plan. Moreover, Susie was not able to appropriately complete the bustrip planning forms even once during the observation period.

- Susie will support MH/cluster programs.

CCSF 00112

- Moran Hall attendance is attached for the month of July (See attachment). There are many days without attendance from D3. Attendance has not been completed for the Thursday Bingo, for which Susie is responsible. During our supervision meeting on 8/12/03 we discussed this issue. The copies I had made prior to my vacation no longer matched the original attendance. The documents were altered after the 29th of July. Susie had no explanation for the discrepancy.
- I have also observed the cluster programs regularly. I have not seen Susie positively engage residents during the activities. (i.e. singing with residents during music therapy, assisting with bingo appropriately as described in the protocol) Nor have I seen her in the gardening group, at all.
- Team members have reported many problems. (i.e. Susie was responsible for the attendance book during July/Aug./Sept. The book was reported missing. After a week another team member assembled a new book. That same day the original book was located on D3. Susie neglected to provide the attendance book before the 1st of the month in July and September making it difficult for anyone to take attendance)
- Another AT team issue occurred on the day of the summer sale, 7/24/03. Susie failed to "share" donations made by the dementia cluster and volunteers. Susie made several staff uncomfortable when refusing to accept coupons from a resident for merchandise. Moreover, Susie didn't assist in the clean up process. Lastly, to my knowledge no residents were involved in the process of organizing and running the sale from D3.

Due to the lack of progress made in meeting the developmental plan goals and Susie's attitude regarding her responsibility and commitment to improvement coupled with the above noted corrective action, I am recommending a 4-day suspension.

Attachments: Moran Hall attendance records, beginning in July 03 schedule of activities on D3, July 4th memo, 7/20/03 memo of supervisors vacation and calendar expectations, copy of the August calendar (unapproved), developmental plans

NAME

CHARGE(S):

NOTIFICATION DATE:

EMPLOYEE'S STATEMENT (OPTIONAL):

10/27/03

No statement given

ACTION BY IMMEDIATE SUPERVISOR

ACTION RECOMMENDED:

☐ DISCIPLINARY
WARNING

☒ DISCIPLINARY
SUSPENSION 4
DAYS

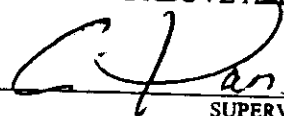
☐ TERMINATION/
DISMISSAL

☐ OTHER, SPECIFY: _____

I ACKNOWLEDGE THIS CONFERENCE, WHILE NOT NECESSARILY AGREEING TO THE ABOVE ALLEGATIONS;

10/23/03
DATE OF CONFERENCE


EMPLOYEE SIGNATURE


anson, CTRS
SUPERVISOR SIGNATURE

COPY OF CONFERENCE FORM:

☒ GIVEN TO EMPLOYEE 10/23/03 OR
DATE

☐ SENT CERTIFIED
MAIL _____
DATE

YOU MAY REQUEST A REVIEW OF THIS RECOMMENDATION TO THE REVIEWER BY 10/31/03
10/10/03
(Date)

____ William Frazier, Director of Therapeutic Activities
NAME AND TITLE OF REVIEWER
(Division Head or Designee)

☐ Employee Copy

☐ Department Copy

☐ File Copy

CCSF 00113

The conference that was scheduled for 10/23/03 happen as scheduled. In attendance were Susie Abram (employee), Ruben Garcia (union representative) and Christine Hanson (supervisor). During the meeting, Ruben explained that Susie did the best she could, and she felt she met the goals set in the developmental plans. Therefore, they didn't agree with the charges. Supervisor asked if there were any issues in the conference form that needed more explanation. They stated they did not have any questions. Ruben and Susie did express they would be appealing the charges.

REVIEWER

PAGE 3

Susie Abram
NAMEInattention to Duty
CHARGE(S):October 16, 2003
NOTIFICATION DATE:**REVIEW AND RECOMMENDATION BY REVIEWER**

A review meeting was held on Thursday, January 20th at 1:00 in Room B104 at Laguna Honda Hospital. In attendance were Susie Abram, SEIU Local 790 representative Ruben Garcia, and myself, William Frazier. The purpose of the meeting was to review the charges of inattention to duty, failure to meet the goals of a developmental plan, which were made by Activity Therapy Supervisor, Christine Hanson. The original employee conference was held October 23rd, 2003, after which Ms. Hanson recommended a four-day suspension. The review meeting had not been scheduled before Ms. Abram took a leave of absence from November 13th, 2003 to September 17th of 2004.

At the meeting, Mr. Garcia stated that he and Ms. Abram did not agree with the charges and asked that the disciplinary action be dismissed. I responded that without any specific information to dispute the findings of Ms. Hanson, I could not justify dismissing the disciplinary action. An agreement was reached that Ms. Abram and Mr. Garcia would produce a written response that would provide evidence to dispute the charges including the names of persons who could verify the information. A due date for the response to be submitted was set at seven days from the date of the meeting, or January 27th.

I received an e-mail message from Ms. Abram on Wednesday, January 26th requesting that she be given additional time to complete her statement as she had been out sick on the preceding Monday and Tuesday. Ms. Abram also was out sick on Friday January 28th. I responded to her message on Friday, January 28th indicating that I would extent the due date for her statement until Tuesday, February 1st. I did not receive the statement from Ms. Abram or Mr. Garcia by the close of business, February 1st.

On February 2nd, I received an e-mail message from Ms. Abram indicating that she felt that she had executed her duties as appropriate and that the decision on the review had already been made in her opinion. She indicated that she planned to file a grievance and asked that she be informed about the duration of the suspension and when the suspension would be scheduled.

Ms. Abram and Mr. Garcia failed to provide any information at the review meeting to dispute the events that led to the charges of inattention to duty. They were provided with an additional opportunity to contest the charges, but chose not to respond.

The purpose of the developmental plan is to improve the performance of a staff member in the execution of his or her responsibilities. My priority in this situation is to have Ms. Abram improve and sustain her performance, not that she be suspended.

Even though, I am reducing the suspension from 4 to 2 days as a good faith effort, Ms. Abram must also assume responsibility for the improvement of her performance as well as the lack of progress in reaching the goals established in the plan.

I will direct Ms. Abram's current supervisor to work with her closely, providing the necessary support and direction in order to ensure that Ms. Abram's performance continues to improve.

ACTION RECOMMENDED:

☐ DISCIPLINARY
WARNING☒ DISCIPLINARY
SUSPENSION 2
DAYS☐ TERMINATION/
DISMISSAL☐ OTHER, SPECIFY: _____

CCSF 00115

SIGNED:

William D. Fay

DIRECTOR OF THERAPEUTIC ACTIVITIES

REVIEWER (NAME AND TITLE)

McHale

COPY OF CONFERENCE FORM:

☒ GIVEN TO EMPLOYEE 2/25/05 OR
DATE

☐ SENT CERTIFIED
MAIL

DATE

☐ Employee Copy

☐ Department Copy

☐ File Copy

DEVELOPMENTAL PLAN

Employee: Susie Alram
Title: HWH

Target Performance: Improved Implementation of Activities

Current Status: Susie is not contributing to the success of Alram Hall programs. She plans other activities to avoid participation in cluster programs, does not follow the protocol for the bingo program when facilitating, frames changes in a less than desirable manner to decrease the likelihood of residents and staff supporting the programs.

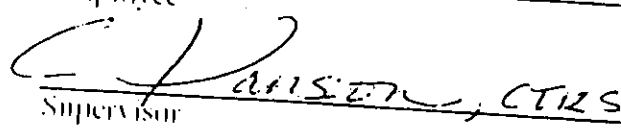
Goal: Susie will support MHF cluster based programs by

- Enlisting at least 4 residents from her unit per activity to participate in each program.
 - Assist transport residents to the programs daily.
 - Remind staff and residents of the programs daily in the morning.
 - Not plan activities that conflict with the MHF activities.
 - Begin transport 10-15 minutes prior to the beginning of the groups.
 - Reviewing and following the Alram Hall bingo facilitation protocols.
- Susie will frame information in a positive manner in order to decrease resident and staff resistance to changes in the program and encourage support by not putting responsibility onto others.

Comments: See Alram Hall activity protocols on the computer disk with 2003 calendars. One copy will be included with this plan.

Effective Date: ~~5/13/03~~ 7/1/03

Follow-up Date: ~~7/15/03~~ 9/1/03

Employee	Date
	5/13/03
Supervisor	Date

Follow-up Did employee achieve Goal? Yes ☐ No ☒

Comments:

Employee	Date
Supervisor	Date

D3

UPDATED: 05/10/08
SHEET BY: BCD/OPHEE

DATE: 6/11/08
TIME: 2:15 PM

7/8/9/10/11

COPY

NAME	LAST NAME	FIRST NAME	DOB	RELIGION
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02	WILLIAM	WILLIAM	01-01-01	NO PREF
03	WILLIAM	WILLIAM	01-01-01	NO PREF
04	WILLIAM	WILLIAM	01-01-01	NO PREF
05	WILLIAM	WILLIAM	01-01-01	NO PREF
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07	WILLIAM	WILLIAM	01-01-01	NO PREF
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75	WILLIAM	WILLIAM	01-01-01	NO PREF
76	WILLIAM	WILLIAM	01-01-01	NO PREF
77	WILLIAM	WILLIAM	01-01-01	NO PREF
78	WILLIAM	WILLIAM	01-01-01	NO PREF
79	WILLIAM	WILLIAM	01-01-01	NO PREF
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81	WILLIAM	WILLIAM	01-01-01	NO PREF
82	WILLIAM	WILLIAM	01-01-01	NO PREF
83	WILLIAM	WILLIAM	01-01-01	NO PREF
84	WILLIAM	WILLIAM	01-01-01	NO PREF
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98	WILLIAM	WILLIAM	01-01-01	NO PREF
99	WILLIAM	WILLIAM	01-01-01	NO PREF
100	WILLIAM	WILLIAM	01-01-01	NO PREF

Total Number of Records for Week: 24

P3

[illegible]

D²

21 22 23 24
 COPY

To: Acute and Psychosocial AT's
From: Christine Hanson
Date: 7/20/03
RE: August calendars and my vacation

Folks,

I am going on vacation from 7/31 until 8/10. Please be sure to complete your calendars by the 28th. That will ensure I will be able to return them to you before I go.

To: Acute and Psychosocial AT's
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Date: 7/20/03
RE: August calendars and my vacation

*Calendar & vacation
info.*

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Folks,

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2-3PM On unit/ Paperwork, planning, computer and assist residents to the
3:30/4 Planning meetings
6-9 evening program

Wednesday

9AM On unit/ Paperwork, planning, computer and assist residents to the
10AM IDT
11:30AM 1:1 visits (off-unit)
12:30-1:30 Lunch
1:30PM On unit/Preparing residents for the next group
2-3PM Gardening or ceramics
3:30PM 1:1 visits (isolation)
3:30 every other Wednesday Prosocial

Thursday

9AM news group
10:30AM Community Meeting
11-12AM Exercise
12:30-1:30 Lunch
1:30-2:30 Facilitate bingo in MH
3PM strolls, pathfinding and hospital tours
3:30 every 2nd and 4th Thursday AT staff meeting or inservice

Friday (often a bustrip day)

9:15 news group
10AM sing-a-long, or cooking
12-12:30 Paperwork and planning
12:30-1:30 Lunch
1:30PM On unit
2-3PM Brainstormers
3:30PM 1:1 visits (reading)

Saturday (often special events pull Susie from the unit and MH)

9AM on unit (movies)
10:45AM Fitness Group MH
12-1PM Lunch
1:00PM Assist residents to the movie
3:30 weekend planning group

THERAPIST Lusier

REMINDER CHECKLIST

- Attendance Sheets ✓
- Food Service Orders ✓
- Updated Rosters ✓
- Sign Out Equipment ✓
- Bus Trip ✓
- Invitation to Program Planning ✓
- Movie Guide ✓
- MDS Sheet review from Previous Month ✓
- Ward Receipts from Previous Month ✓

- DUE FIRST DAY OF THE MONTH
- DUE THE FIRST FRIDAY OF THE MONTH

Total Number of Activities Planned _____

WARD ROUNDS _____

HEAD NURSE SIGNATURE _____

SUPERVISORS SIGNATURE _____

Turn in 7/21/03
3:56 PM

Returned not sign
7/22/03
Lusier

• DATE: _____ TIME: _____ ACTIVITY: _____	_____
SUBSTITUTED ACTIVITY: _____	_____
UNPLANNED ABSENCE _____ PLANNED ABSENCE _____ MEETING _____	_____
OTHER _____ SUPERVISOR _____	_____
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SUBSTITUTED ACTIVITY: _____	_____
UNPLANNED ABSENCE _____ PLANNED ABSENCE _____ MEETING _____	_____
OTHER _____ SUPERVISOR _____	_____

375 Laguna Honda Blvd.
San Francisco, CA 94116
(415) 664-1580

OTHER PROGRAM ACTIVITIES:

RESIDENTS' COUNCIL
Friday, August 15th, 2003
7th Floor Conference Room
11:00 a.m.

Special Events - August 2003

Special Events - August 2003

375 Laguna Honda Blvd.
San Francisco, CA 94116
(415) 664-1580

OTHER PROGRAM ACTIVITIES:

RESIDENTS' COUNCIL
Friday, August 15th, 2003
7th Floor Conference Room
11:00 a.m.

Special Events - August 2003

Special Events - August 2003

CHECK WITH A.T. OR CALL 4-2704 FOR INFORMATION

CCSF 00124

6

100

- Total Number of Activities Planned _____

HEAD NURSE SIGNATURE [Signature]

Turn in 7/21/03
3:56 PM

Returned not signed
7/23/03 8pm
A. Larson, CTR

ACTIVITY PROGI

OTHER PROGRAM ACTIVITIES:

RESIDENTS' COUNCIL

Friday, August 15th, 2003
7th Floor Conference Room
11:00 a.m.

Special Events - August 2003

SUNDAY

MONDAY

TUESDAY

W

BIRTHDA

3

10

17

24/3

Sunday	Monday	Tuesday
<p>3</p> <p>CATH MASS 10:15 MUSIC 6TH FL 1:30 EXERCISE 4TH FL 1:45 BINGO 7TH FL 3:00</p>	<p>4</p> <p>SPANISH CLUB 10:00 4TH FL VOL. BINGO MH 1:30</p>	<p>5</p> <p>BIBLE STUDY G3 10:30 WEEKLY REVIEW 1:15 MUSIC TX MH 2:00 IND LIVING WKKKSHOP LIB 3TH FL SOCIAL 3RD FL MH 7:00</p>
<p>10</p> <p>CATH MASS 10:15 MUSIC 6TH FL 1:30 EXERCISE 4TH FL 1:45 BINGO 7TH FL 3:00</p>	<p>11</p> <p>SPANISH CLUB 10:00 4TH FL VOL. BINGO MH 1:30</p>	<p>12</p> <p>CHURCH SING A LOU BIBLE STUDY G3 10:30 WEEKLY REVIEW 1:15 MUSIC TX MH 2:00 IND LIVING WKSHOP 2:00 LIB 3TH FL</p>
<p>17</p> <p>CATH MASS 10:15 MUSIC 6TH FL 1:30 EXERCISE 4TH FL 1:45 BINGO 7TH FL 3:00</p>	<p>18</p> <p>SPANISH CLUB 10:00 BINGO MH 1:30</p>	<p>19</p> <p>BIBLE STUDY G3 10:30 WEEKLY REVIEW 1:15 MUSIC TX MH 2:00 LIB 3TH FL</p>
<p>24</p> <p>CATH MASS 10:15 MUSIC 6TH FL 1:30 BINGO 7TH FL 3:00</p>	<p>25</p> <p>SPANISH CLUB 10:00 BINGO MH 1:30</p>	<p>26</p> <p>BIBLE STUDY G3 10:30 WEEKLY REVIEW 1:15 MUSIC TX MH 2:00 LIB 3TH FL</p>

CCSF 00126

CHECK WITH A.T. OR CALL 4

DAY THURSDAY FRIDAY SATURDAY

Wednesday	Thursday	Friday	Saturday
		NEWS GROUP 915 5:45 SING A LONG 10:00 BRAINSTORMERS HM 2:45 I, IS VISITS READING 3:00	ART 10:30 5TH FL FITNESS 10:45 MH MOVIE 7TH FL CONF RM 1:30 WEEKEND PLANNING 3:30
JP 9-15 10 11:30 2:00	NEWS GROUP 9:15 COMMUNITY 10:30 EXERCISE 11:00 BINGO 1:30 MH	NEWS GROUP 915 10:45 SING A LONG 10:00 BRAINSTORMERS HM 2:45 I, IS VISITS READING 3:00	ART 10:30 5TH FL FITNESS 10:45 MH MOVIE 7TH FL CONF RM 1:30 WEEKEND PLANNING 3:30
JP 10-15 10 11:30 2:00	NEWS GROUP 9:15 COMMUNITY 10:30 EXERCISE 11:00 BINGO 1:30 MH	NEWS GROUP 915 SING A LONG 10:00 BRAINSTORMERS HM 2:45 I, IS VISITS READING 3:00	ART 10:30 5TH FL FITNESS 10:45 MH MOVIE 7TH FL CONF RM 1:30 WEEKEND PLANNING 3:30
JP 15-16 10 11:30 2:00 MH	BUS TRIP 8:30 BINGO 1:30 MH	NEWS GROUP 915 SING A LONG 10:00 BRAINSTORMERS HM 2:45 I, IS VISITS READING 3:00	ART 10:30 5TH FL FITNESS 10:45 MH MOVIE 7TH FL CONF RM 1:30 WEEKEND PLANNING 3:30
JP 16-15 10 11:30 2:00 MH	NEWS GROUP 9:15 COMMUNITY 10:30 EXERCISE 11:00 BINGO 1:30 MH	NEWS GROUP 915 SING A LONG 10:00 BRAINSTORMERS HM 2:45 I, IS VISITS READING 3:00 CALENDAR PLANNING CALENDAR DECORATE 2:00	ART 10:30 5TH FL FITNESS 10:45 MH MOVIE 7TH FL CONF RM 1:30 WEEKEND PLANNING 3:30

OTHER PROGRAM ACTIVITIES:

MONDAY

10:00am Coffee Carts
10:30am Spanish Club, Volunteers' Lounge
1:30pm Bingo, Moran Hall
Art Therapy, 7th Floor Conference Rm.
2:00pm Society of Our Lady, Room A310
(Every Monday)
Stroke Support Group, 4th Fl., Volunteers' Lounge
(last Monday of each month)
7:00pm Blackjack Club, 4th Floor, 1st, 3rd and 4th Mondays
7:00pm Laguna Tonight, Moran Hall, 2nd and 4th Mondays

TUESDAY

10:00am Coffee Carts
10:45am Catholic Mass, Chapel
1:30pm Music, 6th Floor, Alcove
2:00pm Photography, B400, 2nd & 4th Tuesday, 4th Floor, Volunteers' Lounge
7:00pm Entertainment Tonight, 6th Floor Alcove
7:00pm Bingo Social, Moran Hall
Bowling, (location to be announced)

WEDNESDAY

9:00-11:30am Art with Elders, 3rd Floor, Moran Hall
10:00am Coffee, Pastries, Music, 4th Floor
10:30am Episcopal Service, Main Chapel (2nd Wed.)
10:45am Spanish Mass, Main Chapel
1:00-3:00pm Head Trauma Group, M-4 Kitchen
1:00-3:00pm Art with Elders, Moran Hall
1:30pm Bingo, 4th Floor, Volunteer Lounge
7:00pm A.A. Meeting, 4th Floor, Residents Kitchen
7:00pm Mind Bender, 5th Floor, Marina Beach Alcove

THURSDAY

10:30am Baptist Services, 7th Floor Conference Room
1:30pm Bingo, Moran Hall
7:00pm Music Concert, 6th Floor, Mirraon Alcove District
7:00pm Trivia, 4th Floor, North Beach Alcove

FRIDAY

9:00am Head Trauma Group, M-4 Kitchen
10:00am Coffee Carts
7:00pm Young Independent Peoples Social, 1st, 2nd, 3rd & 5th Fridays - Moran Hall, 4th Fridays - 4th Floor Volunteer Lounge

SATURDAY

10:00am Pottery Barn, 4th Fl. North Beach Alcove
10:30am Lutheran Service, Main Chapel
10:45am LHM Fitness Center (Exercise & Games) 3rd Floor, Moran Hall
1:30pm Movie Matinee, 7th Fl. Conference Rm.
2:00pm Music in the Alcove, 4th Fl., North Beach Alcove

SUNDAY

9:00-11:30am Outside Farm Area Open
10:15am Roman Catholic Mass, Main Chapel
11:00am Soda Fountain, 3rd Fl., Moran Hall
1:30pm Music for Dancing, 6th Floor Mirraon District Alcove
1:20pm Outside Farm Area Open
2:00pm Fitness, 5th Floor, Marina Beach Alcove
3:30pm Bingo, 7th Floor, Conference Room

Other Program Activities
Moran Hall, 2nd Floor, Open Everyday

• DATE: _____ TIME: _____ ACTIVITY: _____
SUBSTITUTED ACTIVITY: _____
UNPLANNED ABSENCE _____ PLANNED ABSENCE _____ MEETING _____
OTHER _____ SUPERVISOR _____

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